

**Amenities / Services Listing**  
**Diocese of Venice, Blessed Pope John XXIII Site**

**Grocery Stores**

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| <p>1. <b>Circle K</b><br/>13391 Danport Blvd, Fort Myers, FL<br/>0.54mi (239) 768-5599</p> <p>2. <b>Publix Pharmacy</b><br/>13650 Fiddlesticks Blvd, Fort Myers, FL<br/>0.59mi (239) 768-1413</p> <p>3. <b>Publix Super Market</b><br/>13650 Fiddlesticks Blvd, Fort Myers, FL<br/>0.59mi (239) 768-1710</p> <p>4. <b>Little India</b><br/>7420 Sika Deer Way, Fort Myers, FL<br/>2.29mi (239) 936-9299</p> <p>5. <b>In Bloom Flowers &amp; Gifts</b><br/>6900 Daniels Pkwy Ste 22, Fort Myers, FL<br/>2.32mi (239) 768-2799</p> | <p>6. <b>Publix Super Market</b><br/>6900 Daniels Pkwy Ste 19, Fort Myers, FL<br/>2.32mi (239) 768-2101</p> <p>7. <b>Norman Love Confections</b><br/>11380 Lindbergh Blvd, Fort Myers, FL<br/>2.36mi (239) 561-7215</p> <p>8. <b>Sweetbay Liquor</b><br/>6800 Shoppes At Plantation Dr, Fort Myers, FL<br/>2.58mi (239) 561-9180</p> <p>9. <b>Flowers Baking Co</b><br/>13200 Metro Pkwy, Fort Myers, FL<br/>2.94mi (239) 561-0381</p> <p>10. <b>IBC Wonder</b><br/>12410 Metro Pkwy, Fort Myers, FL<br/>3.01mi (239) 768-5403</p> |
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**Places of Worship**

- |   |   |
|---|---|
| <p>1. <b>Pope John Xxii Catholic Church</b><br/>13060 Palomino Ln, Fort Myers, FL<br/>0.06mi (239) 561-2245</p> <p>2. <b>Unitarian Universalist Church</b><br/>13411 Shire Ln, Fort Myers, FL<br/>0.91mi (239) 561-2700</p> <p>3. <b>Church of the Cross</b><br/>13500 Freshman Ln, Fort Myers, FL<br/>1.06mi (239) 768-2188</p> <p>4. <b>First Church of the Nazarene</b><br/>13545 American Colony Blvd, Fort Myers, FL<br/>1.43mi (239) 936-2511</p> <p>5. <b>Fort Myers Evangelical Free</b><br/>6798 Plantation Pines Blvd, Fort Myers, FL<br/>2.27mi (239) 768-0308</p> | <p>6. <b>Safe Harbor Community Church</b><br/>Fort Myers, FL<br/>2.55mi (239) 561-6620</p> <p>7. <b>Celebration Family Church</b><br/>Fort Myers, FL<br/>2.63mi (239) 768-1300</p> <p>8. <b>Daniels Road Baptist Church</b><br/>5878 Daniels Pkwy, Fort Myers, FL<br/>3.33mi (239) 481-2416</p> <p>9. <b>Christ Community Church</b><br/>4050 Colonial Blvd, Fort Myers, FL<br/>3.71mi (239) 939-5656</p> <p>10. <b>Newapostolic Church</b><br/>10331 Deer Run Farms Rd, Fort Myers, FL<br/>3.41mi (239) 278-3807</p> |
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**Amenities / Services Listing**  
**Diocese of Venice, Blessed Pope John XXIII Site**

**Libraries**

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|---|--|
| 1. <b>Real Estate Library</b><br>13891 Jetport Loop # F, Fort Myers, FL<br>1.37mi (239) 992-7353                | 6. <b>Ecc Learning Resources</b><br>8099 College Pkwy, Fort Myers, FL<br>5.15mi (239) 489-9219       |
| 2. <b>Southwest Florida Library Ntwk</b><br>12751 Westlinks Dr Ste 3-7, Fort Myers, FL<br>3.08mi (239) 225-4225 | 7. <b>Lee Cancer Care</b><br>2780 Cleveland Ave Ste 719, Fort Myers, FL<br>6.52mi (239) 334-5000     |
| 3. <b>Brown Academy</b><br>12211 Towne Lake Dr, Fort Myers, FL<br>3.49mi (239) 332-1900                         | 8. <b>Dunbar Jupiter Hammon Library</b><br>3095 Blount St, Fort Myers, FL<br>6.76mi (239) 334-3602   |
| 4. <b>More Space Place</b><br>14680 S Tamiami Trl Ste 6, Fort Myers, FL<br>4.43mi (239) 489-2828                | 9. <b>Lakes Regional Library</b><br>15290 Bass Rd, Fort Myers, FL<br>6.91mi (239) 533-4000           |
| 5. <b>Shining Stars Children's Center</b><br>Fort Myers, FL<br>4.64mi (239) 277-0514                            | 10. <b>Fort Myers Lee County Public</b><br>2050 Central Ave, Fort Myers, FL<br>6.94mi (239) 479-4635 |

**Banks**

- |   |  |
|---|--|
| 1. <b>Colonial Bank</b><br>9090 Daniels Pkwy, Fort Myers, FL<br>0.45mi (239) 225-4500                             | 6. <b>Sovereign Bank</b><br>8654 Britannia Dr, Fort Myers, FL<br>1.92mi (239) 561-9192             |
| 2. <b>Florida Gulf Bank</b><br>8870 Daniels Pkwy, Fort Myers, FL<br>0.52mi (239) 225-7268                         | 7. <b>Suntrust</b><br>6890 Daniels Pkwy, Fort Myers, FL<br>2.34mi (239) 768-2626                   |
| 3. <b>ATMF FIDDLESTICKS LLC</b><br>13650 Fiddlesticks Blvd, Fort Myers, FL<br>0.59mi (239) 561-1257               | 8. <b>Palumbo &amp; Levins LLS</b><br>6810 Porto Fino Cir, Fort Myers, FL<br>2.51mi (239) 437-0162 |
| 4. <b>Old Florida Bank</b><br>12298 Matterhorn Rd, Fort Myers, FL<br>0.99mi (239) 768-1403                        | 9. <b>Orion Bank</b><br>6651 Orion Dr, Fort Myers, FL<br>2.67mi (239) 225-4560                     |
| 5. <b>Sunbelt Business Advisors</b><br>13410 Parker Commons Blvd Ste 106, Fort Myers, FL<br>1.03mi (239) 936-2245 | 10. <b>Wachovia Bank</b><br>12270 Metro Pkwy, Fort Myers, FL<br>3.03mi (239) 768-3414              |

**Amenities / Services Listing**  
**Diocese of Venice, Blessed Pope John XXIII Site**

Hospitals

- |   |  |
|---|--|
| <p>1. <b>Lincare</b><br/>13891 Jetport Loop Ste 7, Fort Myers, FL<br/>1.37mi (239) 768-2422</p> <p>2. <b>Apria Healthcare</b><br/>13891 Jetport Loop Ste 3, Fort Myers, FL<br/>1.37mi (239) 225-1264</p> <p>3. <b>Daniels Parkway Animal Hospital</b><br/>6900 Daniels Pkwy, Fort Myers, FL<br/>2.32mi (239) 768-5555</p> <p>4. <b>Option Care</b><br/>11341 Lindbergh Blvd, Fort Myers, FL<br/>2.36mi (239) 561-3456</p> <p>5. <b>M C Johnson Co Inc</b><br/>8801 Business Park Dr Ste 201, Fort Myers, FL<br/>2.44mi (239) 591-2600</p> | <p>6. <b>Greentree Services</b><br/>Fort Myers, FL<br/>2.44mi (239) 561-3889</p> <p>7. <b>Saint Marks Surgery Center LLC</b><br/>6820 International Center Blvd, Fort Myers, FL<br/>2.45mi (239) 561-0532</p> <p>8. <b>Dental Techniques Inc</b><br/>6805 Porto Fino Cir, Fort Myers, FL<br/>2.51mi (239) 482-8773</p> <p>9. <b>Artel Companies</b><br/>13750 Plantation Rd, Fort Myers, FL<br/>2.67mi (239) 561-8877</p> <p>10. <b>Lab Corp</b><br/>13861 Plantation Rd, Fort Myers, FL<br/>2.76mi (239) 477-2066</p> |
|---|--|

Physicians

- |  |  |
|--|--|
| <p>1. <b>Southwest Florida Regional Medical Center</b><br/>2727 Winkler Ave, Fort Myers, FL<br/>4.79mi (239) 939-1147</p> <p>2. <b>Lee Physician Group Pediatrics</b><br/>4751 S Cleveland Ave, Fort Myers, FL<br/>4.91mi (239) 343-9888</p> <p>3. <b>Associates In Internal Medical</b><br/>1569 Matthew Dr, Fort Myers, FL<br/>5.31mi (239) 939-1700</p> <p>4. <b>Physicians Primary Care</b><br/>9350 Camelot Dr, Fort Myers, FL<br/>6.44mi (239) 481-5437</p> <p>5. <b>Wirth Kathy</b><br/>16271 Bass Rd, Fort Myers, FL<br/>7.30mi (239) 432-3322</p> | <p>6. <b>Munsey Sharon</b><br/>9981 S Healthpark Dr, Fort Myers, FL<br/>7.38mi (239) 482-5514</p> <p>7. <b>Hope Hospice</b><br/>9470 Healthpark Cir, Fort Myers, FL<br/>7.41mi (239) 482-4673</p> <p>8. <b>Lee Memorial Health System</b><br/>636 Del Prado Blvd S, Cape Coral, FL<br/>10.28mi (239) 573-5400</p> <p>9. <b>Lee Physician Group</b><br/>1228 SE 8th Ter, Cape Coral, FL<br/>10.60mi (239) 481-4111</p> <p>10. <b>Eisenberg Howard MD</b><br/>1031 SE 9th Pl Unit 2, Cape Coral, FL<br/>10.76mi (239) 573-8448</p> |
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**Amenities / Services Listing**  
**Diocese of Venice, Blessed Pope John XXIII Site**

**Dentists**

1. **Fiddlesticks Dental Care**  
13650 Fiddlesticks Blvd Ste 200, Fort Myers, FL  
0.59mi (239) 225-1145
2. **Kings Crown Family Dental**  
Fort Myers, FL  
2.32mi (239) 337-5464
3. **Ricardo S Bocanegra Family**  
6805 Porto Fino Cir, Fort Myers, FL  
2.51mi (239) 482-8806
4. **Richard Sanderford Inc**  
10551 Ben C Pratt/6 Mile Cypress Pkwy, Fort Myers, FL  
2.73mi (239) 694-5700
5. **Johnson William H DDS**  
13691 Metro Pkwy Ste 250, Fort Myers, FL  
2.98mi (239) 768-5900
6. **Southwest Endodontics**  
13650 Metropolis Ave Ste 106, Fort Myers, FL  
3.04mi (239) 561-3636
7. **Aesthetic Dental Center**  
13650 Metropolis Ave Ste 108, Fort Myers, FL  
3.04mi (239) 768-5600
8. **Great Expressions Dental Center**  
13670 Metropolis Ave, Fort Myers, FL  
3.05mi (239) 768-2588
9. **Women's Contemporary Health**  
Fort Myers, FL  
3.19mi (239) 561-9191
10. **Joanne Dental**  
14171 Metropolis Ave Ste 201, Fort Myers, FL  
3.22mi (239) 768-1011

**Pharmacies**

1. **CVS Pharmacy**  
9170 Daniels Pkwy, Fort Myers, FL  
0.45mi (239) 561-5151
2. **Publix Pharmacy**  
13650 Fiddlesticks Blvd, Fort Myers, FL  
0.59mi (239) 768-1413
3. **Publix Super Market**  
13650 Fiddlesticks Blvd, Fort Myers, FL  
0.59mi (239) 768-1710
4. **Publix Super Market**  
6900 Daniels Pkwy Ste 19, Fort Myers, FL  
2.32mi (239) 768-2101
5. **Option Care**  
11341 Lindbergh Blvd, Fort Myers, FL  
2.36mi (239) 561-3456
6. **Edison Prescription Shoppe**  
6799 Highland Pines Cir, Fort Myers, FL  
2.41mi (239) 332-1612
7. **Walgreens**  
6790 Daniels Pkwy, Fort Myers, FL  
2.48mi (239) 433-4091
8. **Gulf Coast Infusion Center**  
13685 Doctors Way Ste 150, Fort Myers, FL  
2.94mi (239) 574-8424
9. **Gulf Coast Medical Pharmacy**  
13685 Doctors Way Ste 150, Fort Myers, FL  
2.94mi (239) 278-3969
10. **Best Friends Animal Hospital**  
12220 Towne Lake Dr Ste 50, Fort Myers, FL  
3.50mi (239) 768-7387

**Amenities / Services Listing**  
**Diocese of Venice, Blessed Pope John XXIII Site**

**Police Department**

1. **DSI Laboratories**  
12700 Westlinks Dr, Fort Myers, FL  
3.08mi (239) 561-8200
2. **Crime Stoppers**  
14750 Ben C Pratt/ 6 Mile Cypress Pkwy,  
Fort Myers, FL  
3.98mi (239) 332-5555
3. **Lee County Sheriff's Office**  
14750 Ben C Pratt/ 6 Mile Cypress Pkwy,  
Fort Myers, FL  
3.98mi (239) 477-1200
4. **Deputy Sheriff Association**  
8359 Beacon Blvd, Fort Myers, FL  
4.01mi (239) 425-2729
5. **Lee County Emergency Medical Service**  
Fort Myers, FL  
4.24mi (239) 335-1600
6. **Lee Co Sheriff Youth Service**  
2855 Colonial Blvd, Fort Myers, FL  
4.25mi (239) 936-6326
7. **Law Enforcement-Rgnl Crime Lab**  
4700 Terminal Dr Ste 1, Fort Myers, FL  
4.40mi (239) 278-7170
8. **Law Enforcement Department**  
4700 Terminal Dr Ste 1, Fort Myers, FL  
4.40mi (239) 278-7080
9. **Florida Highway Patrol**  
Fort Myers, FL  
4.40mi (239) 278-7100
10. **Coastal Health Management Service**  
6202 Presidential Ct Ste A, Fort Myers, FL  
4.99mi (239) 481-3611

**Fire and Rescue**

1. **Estero Fire Rescue**  
19415 Skidmore Way, Fort Myers, FL  
5.69mi (239) 267-6753
2. **Estero Fire Rescue**  
21500 3 Oaks Pkwy, Estero, FL  
8.84mi (239) 947-3473
3. **Cape Coral Fire Rescue & Emerg**  
2605 Santa Barbara Blvd, Cape Coral, FL  
10.99mi (239) 574-0503
4. **Bonita Springs Fire & Rescue**  
27701 Bonita Grande Dr, Bonita Springs, FL  
15.58mi (239) 949-6200
5. **Sanibel Fire & Rescue District**  
2351 Palm Ridge Rd, Sanibel, FL  
18.65mi (239) 472-5525
6. **Big Corkscrew Island Fire**  
13240 Immokalee Rd, Naples, FL  
22.92mi (239) 455-5356
7. **Charlotte Fire Rescue Training**  
7105 Florida St, Punta Gorda, FL  
28.90mi (941) 639-1103
8. **Hardee County Ambulance Service**  
149 K D Revell Rd, Wauchula, FL  
69.52mi (863) 773-3313
9. **Duette Volunteer Fire Rescue**  
34010 State Road 62, Duette, FL  
74.91mi (941) 776-9900
10. **Hardee County Fire & Rescue**  
401 W Main St, Bowling Green, FL  
75.04mi (863) 375-2661

**Amenities / Services Listing**  
**Diocese of Venice, Blessed Pope John XXIII Site**

**Department Stores**

1. **Beall's Outlet**  
6900 Daniels Pkwy # B, Fort Myers, FL  
2.32mi (239) 561-8445
2. **South Trail Fire District**  
12780 Commonwealth Dr, Fort Myers, FL  
2.99mi (239) 454-2505
3. **Medical Department Store**  
6261 Topaz Ct # A, Fort Myers, FL  
3.01mi (239) 274-0303
4. **Pyramid II Janitorial Supplies**  
12180 Metro Pkwy, Fort Myers, FL  
3.06mi (239) 417-9266
5. **Dept of Homeland Security**  
11000 Terminal Access Rd, Fort Myers, FL  
3.57mi (239) 561-0740
6. **Kohl's Department Store**  
9357 Benn C Pratt 6 Mile Cypress Pkwy,  
Fort Myers, FL  
3.73mi (239) 275-3667
7. **BJ'S Wholesale Club**  
9300 Ben C Pratt/6 Mile Cypress Pkwy, Fort  
Myers, FL  
3.79mi (239) 896-1071
8. **Bealls Department**  
9300 Ben C Pratt/6 Mile Cypress Pkwy, Fort  
Myers, FL  
3.79mi (239) 274-3098
9. **Lee County Government Animal**  
5600 Banner Dr, Fort Myers, FL  
3.80mi (239) 432-2083
10. **South Trail Fire Department**  
5531 Halifax Ave, Fort Myers, FL  
3.86mi (239) 433-0080

**Post Office**

1. **US Postal Inspector**  
14080 Jetport Loop Rm F1-106, Fort Myers,  
FL  
1.36mi (239) 768-8085
2. **US Post Office**  
10100 Deer Run Farms Rd, Fort Myers, FL  
3.57mi
3. **Mallbox Shipping & Communications**  
13300 S Cleveland Ave Ste 56, Fort Myers,  
FL  
4.12mi (239) 482-5655
4. **US Post Office**  
2655 N Airport Rd, Fort Myers, FL  
4.36mi (239) 277-3336
5. **Post Office-fort Myers**  
3954 Broadway, Fort Myers, FL  
5.27mi (239) 936-6873
6. **US Post Office**  
3954 Broadway, Fort Myers, FL  
5.27mi (239) 000-1111
7. **Pack N'Send**  
8595 College Pkwy, Fort Myers, FL  
5.63mi (239) 433-0747
8. **Pack & Send**  
4600 Summerlin Rd Ste C2, Fort Myers, FL  
5.66mi (239) 275-0777
9. **USPS**  
1350 Monroe St, Fort Myers, FL  
7.51mi (239) 332-3696
10. **US Post Office**  
1350 Monroe St, Fort Myers, FL  
7.51mi (239) 000-1111

**Amenities / Services Listing**  
**Diocese of Venice, Blessed Pope John XXIII Site**

**Shopping Centers**

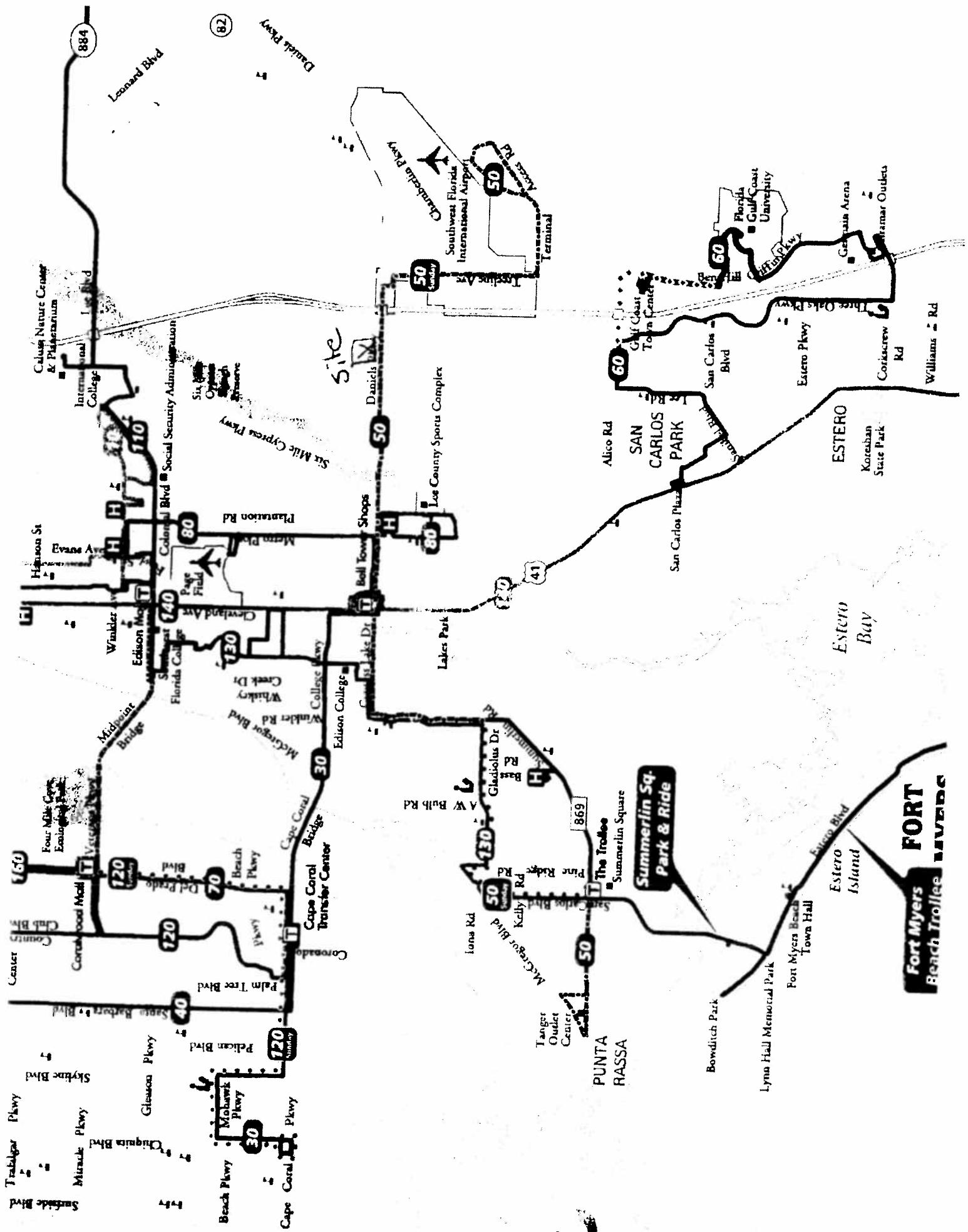
1. **Econo Lodge-Fort Myers Airport**  
13661 Indian Paint Ln, Fort Myers, FL  
0.62mi (239) 561-1117
2. **Comfort Inn & Suites Airport**  
10081 Intercom Dr, Fort Myers, FL  
0.96mi (239) 939-5002
3. **Beall's Outlet**  
6900 Daniels Pkwy # B, Fort Myers, FL  
2.32mi (239) 561-8445
4. **A Slice & Design-Go Shop Mall**  
11300 Lindbergh Blvd, Fort Myers, FL  
2.35mi (239) 267-2224
5. **My Planet Mall**  
12155 Metro Pkwy Ste 5, Fort Myers, FL  
3.07mi (239) 225-7935
6. **Bell Tower Shops**  
Daniels Pkwy & US 41, Fort Myers, FL  
4.04mi
7. **Suburban Extended Stay Hotel**  
10150 Metro Pkwy, Fort Myers, FL  
4.07mi (239) 938-0100
8. **Bell Tower Management Office**  
13499 S Cleveland Ave Ste 161, Fort  
Myers, FL  
4.10mi (239) 489-1221
9. **Cypress Trace Shopping Center**  
13300 S Cleveland Ave, Fort Myers, FL  
4.12mi
10. **Beall's Outlet**  
13300 S Cleveland Ave Ste 44, Fort Myers,  
FL  
4.12mi (239) 482-4307

**Senior Recreation Centers**

1. **Evangelical Christian School**  
8237 Beacon Blvd, Fort Myers, FL  
3.81mi (239) 936-3319
2. **Precision Door Service**  
8141 Mainline Pkwy Unit 4, Fort Myers, FL  
4.09mi (239) 332-1588
3. **Pace Center For Girls Lee Cnty**  
3760 Schoolhouse Rd W, Fort Myers, FL  
4.43mi (239) 425-2366
4. **Southwest Florida Regional Medical Center**  
2727 Winkler Ave, Fort Myers, FL  
4.79mi (239) 939-1147
5. **Senior Friendship Center**  
3600 Evans Ave, Fort Myers, FL  
5.21mi (239) 275-1881
6. **Barkley Place**  
36 Barkley Cir, Fort Myers, FL  
5.30mi (239) 275-0203
7. **Center For Arts**  
6740 Panther Ln, Fort Myers, FL  
5.95mi (239) 481-3592
8. **Life Skills Center of Lee County**  
3637 Dr Martin Luther King Blvd, Fort  
Myers, FL  
6.39mi (239) 332-3484
9. **Lee Memorial Health System**  
2776 Cleveland Ave, Fort Myers, FL  
6.53mi (239) 334-5606
10. **Lee County High Tech Central**  
3800 Michigan Ave, Fort Myers, FL  
6.70mi (239) 334-4544

## **TRANSPORTATION INFORMATION**





# Rte 50

## BUS PASS OUTLET LOCATIONS

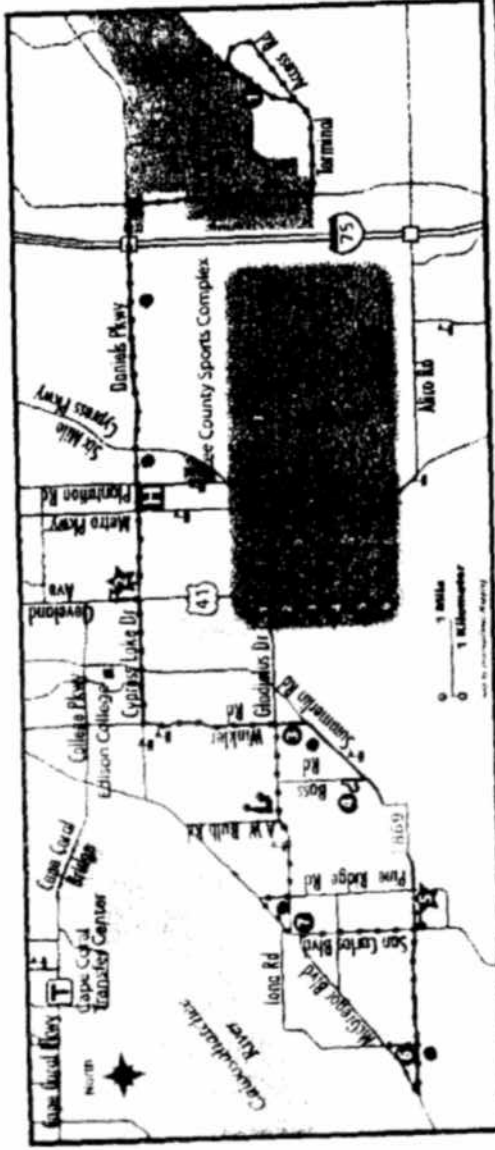
Available at all Public locations  
in Lee County

**Fort Myers:**  
Rosa Parks Transportation Center, 2250 Widman Way  
LeeTran office, 6035 Landing View Rd.

**Cape Coral:**  
Cape Coral City Hall, 1015 Cultural Park Blvd.

**Public Libraries:**  
15290 Bass Rd., Fort Myers  
2001 N. Tamiami Tr., N. Ft. Myers  
921 SW 39th Terr., Cape Coral  
26876 Pine Ave., Bonita Springs  
881 Gunney Rd., Lehigh Acres

Or purchase passes on our secure website at  
[www.ridethebus.com](http://www.ridethebus.com).



## MONDAY - FRIDAY SERVICE

### EASTBOUND

5	6	4	3	2	1
6:10	6:17	6:30	6:35	6:50	6:40
7:00	7:07	7:20	7:25	7:40	7:15
7:45	7:52	8:05	8:10	8:25	8:10
8:25	8:32	8:45	8:50	9:05	8:55
9:35	9:42	9:55	10:00	10:15	10:05
10:50	10:57	11:10	11:15	11:30	11:20
12:00	12:07	12:20	12:25	12:40	12:30
1:15	1:22	1:35	1:40	1:55	1:45
2:25	2:32	2:45	2:50	3:05	2:55
3:00	3:07	3:20	3:25	3:40	3:30
3:40	3:47	4:00	4:05	4:20	4:10
4:50	4:57	5:10	5:15	5:30	5:20
5:25	5:32	5:45	5:50	6:05	5:55
6:05	6:12	6:25	6:30	6:45	6:35
7:15	7:22	7:35	7:40	7:55	7:45
8:15	8:22	8:35	8:40	8:55	8:45
9:10	9:17	9:30	9:35	9:50	9:40

### WESTBOUND

1	2	3	4	5
6:40	7:05	7:20	7:35	7:00
7:20	7:50	8:05	8:20	7:45
8:15	8:45	9:00	9:15	8:30
9:00	9:30	9:45	10:00	9:15
9:40	10:10	10:25	10:40	10:05
10:50	11:20	11:35	11:50	11:15
12:05	12:35	12:50	1:05	1:20
1:15	1:45	2:00	2:15	1:30
2:25	2:55	3:10	3:25	2:40
3:30	4:00	4:15	4:30	3:45
4:15	4:45	5:00	5:15	4:30
4:55	5:25	5:40	5:55	5:10
6:05	6:35	6:50	7:05	6:20
7:15	7:45	7:55	8:10	7:30
8:20	8:50	9:05	9:20	8:40
9:15	9:45	10:00	10:15	9:35

## SATURDAY SERVICE

### EASTBOUND

5	6	4	3	2	1
6:10	6:17	6:30	6:35	6:50	6:40
7:00	7:07	7:20	7:25	7:40	7:15
8:25	8:32	8:45	8:50	9:05	8:55
9:35	9:42	9:55	10:00	10:15	10:05
10:50	10:57	11:10	11:15	11:30	11:20
12:00	12:07	12:20	12:25	12:40	12:30
1:15	1:22	1:35	1:40	1:55	1:45
2:25	2:32	2:45	2:50	3:05	2:55
3:00	3:07	3:20	3:25	3:40	3:30
3:40	3:47	4:00	4:05	4:20	4:10
4:50	4:57	5:10	5:15	5:30	5:20
6:05	6:12	6:25	6:30	6:45	6:35
7:15	7:22	7:35	7:40	7:55	7:45
8:15	8:22	8:35	8:40	8:55	8:45
9:10	9:17	9:30	9:35	9:50	9:40

### WESTBOUND

1	2	3	4	5
6:40	7:05	7:20	7:35	7:00
7:20	7:50	8:05	8:20	7:45
8:15	8:45	9:00	9:15	8:30
9:00	9:30	9:45	10:00	9:15
9:40	10:10	10:25	10:40	10:05
10:50	11:20	11:35	11:50	11:15
12:05	12:35	12:50	1:05	1:20
1:15	1:45	2:00	2:15	1:30
2:25	2:55	3:10	3:25	2:40
3:30	4:00	4:15	4:30	3:45
4:15	4:45	5:00	5:15	4:30
4:55	5:25	5:40	5:55	5:10
6:05	6:35	6:50	7:05	6:20
7:15	7:45	7:55	8:10	7:30
8:20	8:50	9:05	9:20	8:40
9:15	9:45	10:00	10:15	9:35

## SUNDAY SERVICE

### EASTBOUND

5	6	7	3	2	1
8:05	8:12	8:25	8:35	8:45	8:00
9:55	10:02	10:15	10:25	10:35	9:50
11:55	12:02	12:15	12:25	12:35	11:50
1:55	2:02	2:15	2:25	2:35	1:50
3:55	4:02	4:15	4:25	4:35	3:50
5:55	6:02	6:15	6:25	6:35	5:50

### WESTBOUND

1	2	3	7	5
7:00	7:30	7:45	7:55	8:00
8:50	9:20	9:35	9:45	9:50
10:50	11:20	11:35	11:45	11:50
12:50	1:20	1:35	1:45	1:50
2:50	3:20	3:35	3:45	3:50
4:50	5:20	5:35	5:45	5:50
6:50	7:20	7:35	7:45	7:50

PM Times are in **Bold** - All times are approximate

## TRANSIT NOTES

- Be at bus stop 5 minutes before scheduled time.
- Have exact fare. Drivers cannot make change.
- Check the destination sign above the windshield to ensure you are boarding the correct route.
- Cell phone conversations must not disturb other passengers; speakerphones prohibited.
- Out of courtesy to fellow passengers, smoking, drinking, eating, gambling, littering, and music without headphones are not allowed.
- No service provided on the following days:  
New Year's Day  
Memorial Day  
July 4th  
Thanksgiving Day  
Christmas
- Saturday service will be in effect on the following days:  
January 19, 2009  
November 11, 2009  
November 27, 2009  
December 24, 2009  
December 31, 2009

## NOTAS DEL TRANSITO

- Este en la parada de autobus 5 minutos antes de tiempo
- Tenga su tarifa exacta. Los conductores no pueden dar cambio
- Fijese en el anuncio al frente del autobus en el parabrisa indicando adonde viaja el autobus.
- Las conversaciones sobre telefonos celulares no deber molestar a los otros pasajeros; el uso de bocinas telefonicas esta prohibido.
- Para la comodidad de todos nuestros pasajeros en el autobus no se permite fumar, el beber o comer, el juego o el oír musica sin audifonos.
- Los servicios de transito no operan los siguientes dias de fiesta  
Año Nuevo  
El 4 de julio  
El día de Accion de Gracias  
Navidad (25 de diciembre)
- Los siguientes dias siguen el horario de los sábados  
19 de enero  
27 de noviembre  
31 de diciembre

## FARE INFORMATION

Adult Fare	\$ 1.25
Discount Fare (available with Medicare card, or as Disabled Citizen, Senior Citizen (65 or older) or Student with a valid LeeTran ID)	\$ .60
Pre-School Children (under 42 inches)	Free

Exact fare required. No change cards available.

Transfers are no longer available. An All-Day Pass may be purchased from the driver for \$ 2.50.

## PASSES

All Day Pass*	\$ 2.50
Adult 31-Day Pass	\$35.00
Discount 31-Day Pass	\$20.00
Adult 12-Trip Pass	\$12.50
Discount 12-Trip Pass	\$ 6.00
Adult 7-Day Pass	\$12.50
Discount 7-Day Pass	\$10.00
Trolley 3-Day Pass**	\$ 3.00

\*Sold on board the buses

\*\*Sold on board the trolleys.

## TARIFAS DE PASEJE

Tarifa para Adultos	\$ 1.25
Tarifa con descuento (con tarjeta de Medicare o con un ID de LeeTran)	\$ .60
Niños preescolar (menor de 42 pulgadas)	Gratis
Se requiere cambio exacto	

## PASES

Pase para todo el día*	\$ 2.50
Pase de 31 días para Adultos	\$35.00
Pase de 31 días con descuento	\$20.00
Pase de Doce Viajes - Adulto	\$12.50
Pase de Doce Viajes - con descuento	\$ 6.00
Pase de 7 días para Adultos	\$12.50
Pase de 7 días con descuento	\$10.00
Trolley pase de 3 días**	\$ 3.00

\*Pases en venta en los autobuses

\*\*Pases en venta en el trolebús

# 50

SW FL Airport  
Summerlin Sq.



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**LUNES - DOMINGO**

## SERVING THE FOLLOWING AREAS SERVIENDO LAS AREAS SIGUIENTES

- SW FL International Airport
- Bell Tower Shops
- Health Park Hospital
- Summerlin Square
- Tanger Outlet Mall

## TRANSFER POINTS & ADJOINING ROUTES PUNTOS DE LA TRANSFERENCIA Y RUTAS COLINDANTES

Bell Tower Shops	30, 80, 140
Winkler Rd. & Cypress Lake Dr.	130
Summerlin Square	130, Beach Trolley

## MORE INFO

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[www.rideleetrans.com](http://www.rideleetrans.com)

All buses are wheelchair accessible.  
Todos los autobuses son sillon de ruedas accesible.

Effective 1/15/09 - 4/22/09

## **APPRAISAL**

**BASS & ASSOCIATES, INC.**  
**CONSULTING APPRAISERS • PLANNERS • ECONOMISTS**

**VENICE OFFICE**

362 Center Court  
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Send Mail to Main Office

Tracy L. Hiney, CRA/EAC  
State Certified General Appraiser RZ 2314

Stephen A. Gracia  
State Certified Residential Appraiser RD5620

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Richard W. Bass, MA/AICP/EAC  
State Certified General Appraiser RZ 348

Robert J. Fletcher, MA/AICP/CCIM  
State Certified General Appraiser RZ 2463

Susan M. Fletcher  
State Certified General Appraiser RZ 3223

**RESTRICTED USE  
APPRAISAL REPORT**

**FOR  
JOHN HAZELROTH  
JPH & ASSOCIATES, INC.  
P.O. BOX 948006  
MAITLAND, FLORIDA 32794**

**SUBJECT  
POPE 23 CHURCH SITE  
LEE COUNTY, FLORIDA  
DATE OF VALUE**

**MAY 1, 2009**

**DATE OF APPRAISAL  
MAY 5, 2009**

**FILE NO.09-160**

**BASS & ASSOCIATES, INC.**  
**CONSULTING APPRAISERS • PLANNERS • ECONOMISTS**

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**VENICE OFFICE**

362 Center Court  
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Susan M. Fletcher  
State Certified General Appraiser RZ 3223

May 5, 2009

John Hazelroth  
JPH & Associates, Inc.  
P.O. Box 948006  
Maitland, Florida 32794

**Re: A Restricted Use Appraisal Report**  
**Property located at 13060 Palomino Lane**  
**Lee County, Florida**

Dear Mr. Hazelroth:

In response to your authorization, we have conducted the required investigation, gathered necessary data, and made certain analyses that have enabled us to form an opinion of market value for the above captioned property, via the use of a Restricted Use Appraisal.

This is a Special Purposes appraisal setting forth our opinions of value.

The subject property consists of 3.25 acre portion of a larger parent tract.

The purpose of this appraisal is to render a preliminary opinion of market value under the assumption that the 3.25 acre parcel can be improved with 68 housing units.

The use of our appraisal is for internal business decisions of the Diocese of Venice.

The users of the appraisal include: John Hazelroth, JPH & Associates, Inc. And the Diodes of Venice and their advisors.

**BASS & ASSOCIATES, INC.**

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This is a Restricted Use appraisal report that is limited in scope as to the descriptive detail pertinent to the area, the subject and the comparable data. All data pertinent to the analysis and conclusion of value has been retained within our files and is available to the client upon request. Values are based on market conditions in effect as of the date of value.

Based on the inspection of the parent parcel, along with the investigation and analyses undertaken, and subject to the General and Special Assumptions and Limiting Conditions, it is our opinion that the market value of the subject properties, as of the date of value, are as follows:

SIX HUNDRED EIGHTY THOUSAND DOLLARS  
\$680,000

Should you have any questions, please do not hesitate to contact either of us.

Respectfully submitted,



Richard W. Bass, MAI/AICP/EAC  
State-certified General Appraiser RZ 348

Attachment

## CERTIFICATE OF APPRAISAL

I certify that, to the best of my knowledge and belief:

The statements of fact contained in this report are true and correct.

The reported analyses, opinions, and conclusions were developed, and this report has been prepared in conformity with the requirements of the Code of Professional Ethics & Standards of the Professional Appraisal Practice of the Appraisal Institute, which include the Uniform Standards of Professional Appraisal Practice.

The reported analyses, opinions, and conclusions are limited only by the reported assumptions and limiting conditions, and are my personal, impartial, and unbiased professional analyses, opinions, and conclusions.

The use of this report is subject to the requirements of the Appraisal Institute relating to review by its duly authorized representative.

I have no present or prospective interest in the property that is the subject of this report, and no personal interest with respect to the parties involved.

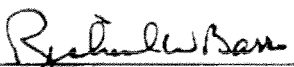
I have no bias with respect to the property that is the subject of this report or to the parties involved with this assignment.

My compensation for completing this assignment is not contingent upon the development or reporting of a predetermined value or direction in value that favors the cause of the client, the amount of the value opinion, the attainment of a stipulated result, or the occurrence of a subsequent event directly related to the intended use of this appraisal.

I have made a personal inspection of the property that is the subject of this report.

As of the date of this report, I have completed the continuing education program of the Appraisal Institute.

No one has provided significant professional assistance in the preparation of this report.

  
By: Richard W. Bass, MAI/AICP/EAC  
State Certified General Appraiser RZ 348



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**GENERAL ASSUMPTIONS  
AND LIMITING CONDITIONS**

## GENERAL ASSUMPTIONS AND LIMITING CONDITIONS VALUATION ASSIGNMENT

A "valuation assignment" is one in which an appraisal is sought. An "appraisal" is defined as:

**"the act or process of developing an opinion of value; an opinion of value".**

Therefore, the following General Assumptions and Limiting Conditions apply to this Valuation Assignment:

1. As real estate analysts and appraisers, no responsibility is assumed for the legal description or for matters including legal or title considerations. As we are not attorneys, any interpretations and opinions rendered are not legal opinions. Title to the property is assumed to be good and marketable unless otherwise stated.
2. Unless otherwise set forth in our opinion of value, the property is appraised free and clear of any or all liens or encumbrances.
3. Responsible ownership and competent property management are assumed.
4. The information furnished by others is believed to be reliable. However, no warranty is given for its accuracy.
5. It is assumed that there are no hidden or unapparent conditions of the property, subsurface, surface, or structures, that render it more or less valuable. No responsibility is assumed for such conditions or arranging for engineering studies that may be required to discover any defects. We are not trained as home inspectors or building inspectors.
6. It is assumed that there is full compliance with all applicable federal, state, and local environmental regulations and laws unless noncompliance is stated, defined, and considered in the appraisal.
7. It is assumed that all applicable zoning and use regulations and restrictions have been complied with, unless a nonconformity has been stated, defined, and considered in the appraisal.
8. Possession of a printed report or a copy thereof, does not carry with it the right of publication or duplication. It may not be used or relied upon for any purpose by any individual, group, company, governmental entity or corporation other than the identified intended user(s) as set forth within the report.
9. The appraiser herein by reason of rendering an opinion of value is not required to give further consultation, testimony or be in attendance in any court with reference to the property in question unless such arrangements are in the original engagement agreement or separately agreed to by both parties to said agreement.
10. Should a third party call upon the appraiser for testimony, either expert testimony or fact testimony, as a result of the valuation assignment, the client is responsible for the appraisers professional fees and direct expenses.
11. Neither all nor any part of the contents of the appraisal, expressed either orally or in writing (especially any opinion as to value), the identity of the appraiser or the firm with which the appraiser is connected shall be disseminated to the public through advertising, public relations, news, sales materials, or other media without the prior written consent and approval of the client and the appraiser.
12. The opinion of the appraiser is in no way contingent upon the reporting of a predetermined direction in value or specified value.
13. Date of value to which conclusions and opinions expressed in this report apply, is set forth in the report. Further, the dollar amount of the value opinion herein rendered is based upon the purchasing power of the U. S. dollar existing on that date.
14. Appraiser assumes no responsibility for economic or physical factors which may affect the opinion of the appraiser occurring at some date after the date of the letter transmitting this report.
15. Appraiser reserves the right to make adjustments to the valuation of the subject property, as may be required by consideration of additional reliable data that may or may not have been discovered at the time of the appraisal or which becomes available after the date of value.
16. The opinion of value represents the best opinion of the analysts as to the value of the interested considered and upon which said value is based.
17. The appraiser has no past, present or contemplated future undisclosed interest in the subject property or parties to the valuation assignment.
18. The appraisal has been made in conformity with the Uniform Standards of Professional Appraisal Practice (USPAP), the Florida Real Estate Commission - Real Estate Appraisal Sub-Committee as

## BASS & ASSOCIATES, INC.

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- a Certified Appraisal Report; as well as the Appraisal Institute supplemental standards. Applicable USPAP standards and guidelines are incorporated by reference herein.
19. Personal inspection was made of the subject property and comparables relied upon in this valuation assignment.
  20. Unless otherwise stated, no one assisted the appraiser(s) in the analysis, conclusions, and opinions concerning real estate valued.
  21. All furnishings and equipment, unless specifically indicated, have been disregarded by the appraiser. Only this real estate has been considered.
  22. If no survey of the subject property is provided to the appraiser, it is assumed the legal description and/or current plat obtained from the public records closely delineates said property.
  23. Physical condition of any improvements located above grade or below grade on the subject property is based on visual inspection. No responsibility or liability is assumed for non-readily observable features or for the soundness of structural members or below grade features.
  24. Certain data used in compiling the requested opinion of value will be furnished by the client or others. Such data is assumed to be reliable and is verified when practical. No representations are herein provided as to correctness or accuracy of such third party data.
  25. A diligent effort to verify each comparable sale data. However, if personal contact is not possible, public records will be relied upon for verification. Further, it is recognized that in the confirmation process there exists the potential for misinformation, misleading information and fraudulent information being provided to the appraiser. Should such misinformation, in any form, be provided to the appraiser, no responsibility or liability is assumed by the appraiser.
  26. Any photographs which may be apart of the valuation assignment are intended to reflect the general character of the area, the subject and/or comparable data. Said photograph are for illustrative purposes only.
  27. Any maps or other graphic devices are intended to be illustrative and general in character and location. The subject property and any comparable properties are best identified by official Appraisers Parcel Number issued by the applicable Office of the County Property Appraiser.
  28. Payment of the appraisal fee and any direct expenses as set forth in the engagement agreement constitutes the level of exposure of the appraiser individually or appraisal firm. It is mutually agreed that non-payment of the professional fee(s) and/or applicable direct expenses as set forth in the engagement agreement may result in the filing of a lien upon the subject property to secure payment of said fees and costs as well as any other applicable remedies at law.
  29. If a written report is provided as part of the valuation assignment, used to support an oral opinion of value, said report is conditioned as a preliminary report only and subject to change including Condition Number 16 above, as well as any relevant interpretation or reinterpretation of the applicability of any provision of the Uniform Standards of Professional Appraisal Practice, as may be amended from time to time.
  30. Particularly applicable to any assignment which has the potential to result in litigation, any such written appraisal report is done to support said oral testimony only and can only be relied upon as supporting said testimony and not as a free standing document.
  31. During the research and analysis process of the valuation assignment, additional "specific" assumptions and/or limiting conditions may be appropriate for the opinion value sought. If so, they will be set forth separately to specifically identify same.
  32. Confidentiality of the appraiser/client relationship is controlled by Florida Statutes and applicable implementing Rules, as well as those of professional membership in the Appraisal Institute. The appraiser may not divulge confidential data to third parties without consent of the client (customer). Our understanding of applicable laws and rules of the State of Florida is that they are more restrictive than those of the Gramm-Leach-Bliley Act of 1999.

### HYPOTHETICAL CONDITIONS

- A. That a 3.25 acre parcel could be severed from the parent tract and separately development with multifamily housing.
- B. The hypothetical condition is that the Diocese of Venice would be permitted to construct 68 one bedroom units on a 3.25 acre parcel.

**RESTRICTED APPRAISAL REPORT**

## RESTRICTED USE APPRAISAL REPORT

This is a Restricted Use Appraisal Report which is intended to comply with the reporting requirements set forth under Standards Rule 2-2(c) of the Uniform Standards of Professional Appraisal Practice. As such, it presents only summary discussions of the data, reasoning, and analysis that were used in the appraisal process to develop the appraiser's opinion of value. Supporting documentation concerning the data, reasoning, and analysis is retained in the appraiser's file. The depth of discussion contained in this report is specific to the needs of the client and for the intended use stated below. The appraiser is not responsible for unauthorized use of this report.

### CLIENT:

John Hazelroth  
JPH & Associates, Inc.  
P.O. Box 948006  
Maitland, Florida 32794

### APPRAISER:

Richard W. Bass, MAI/AICP/EAC  
State Certified General Appraiser RZ 348

### SUBJECT:

The subject is proposed to be severed from a larger parent tract and consist of 3.25 acres more or less from the Southwest corner of the overall property.

The parent tract of the subject is addressed as 13060 Palomino Lane, Fort Myers, Florida 33912-1407. The Parcel Identification Number is 22-45-25-00-00001-0100.

### PURPOSE OF THE REPORT:

The purpose of this appraisal is to render a current opinion of the market value of the subject real property as of the effective date, being May 1, 2009 under the assumption that a 3.25 acre portion of the parent tract can be severed and improved with 68 dwelling units. This is a land only valuation assignment.

Market value is defined by the federal financial institutions regulatory agencies as follows:

Market Value means the most probable price which a property should bring in a competitive and open market under all conditions requisite to a fair sale, the buyer and seller each acting prudently and knowledgeably, and assuming the price is not affected by undue stimulus. Implicit in this definition is the consummation of a sale as of a specified date and the passing of title from seller to buyer under conditions whereby:

- (1) buyer and seller are typically motivated;
- (2) both parties are well informed or well advised, and acting in what they consider their own best interest;

## **BASS & ASSOCIATES, INC.**

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- (3) a reasonable time is allowed for exposure in the open market;
- (4) payment is made in terms of cash in U.S. dollars or in terms of financial arrangements comparable thereto; and
- (5) the price represents the normal consideration for the property sold unaffected by special; or creative financing or sales concessions granted by anyone associated with the sale. (Source: Office of the Comptroller of the Currency under 12 CFR, Part 34, Subpart C-Appraisals, 34.42 Definitions.)

### **INTENDED USE:**

The intended use of this appraisal is to provide a current opinion of value for internal business decisions of the client

### **INTENDED USER:**

The users of the appraisal include: John Hazelroth, JPH & Associates, Inc. And the Diodes of Venice and their advisors.

### **INTEREST VALUED:**

Fee simple.

### **EFFECTIVE DATE OF VALUE:**

May 1, 2009

### **DATE OF REPORT:**

May 5, 2009

### **SCOPE OF THE APPRAISAL - DEVELOPMENT AND REPORTING PROCESS:**

The scope of work in preparing this appraisal, the appraiser;

- (1) inspected the subject site and general area,
- (2) gathered and confirmed information on comparable sales which have sold, size, zoning, land use, and location of similar properties;
- (3) extent of data research, physical & economic factors included analyzing market participant activities for likekind property.
- (4) applied the Sales Comparison Approaches to value to arrive at an indication of value.

### **HIGHEST AND BEST USE ANALYSIS**

Highest and Best Use is defined by the Appraisal Institute in, The Appraisal of Real Estate as follows:

*The reasonably probable and legal use of vacant land or an improved property that is physically possible, appropriately supported, and financially*

*feasible and that results in the highest value.<sup>1</sup>*

Implied in this definition is that the determination of highest and best use takes into account the contribution of a specific use to the community and community development goals, as well as the benefits of that use to individual property owners. Hence, in certain situations the highest and best use of land may be for parks, green belts, preservation, conservation, wildlife habitats and the like.

**Tests of Highest And Best Use**

In analyzing the Highest and Best Use of the subject property, a number of physically possible uses are considered. These physically possible uses are then analyzed in light of the highest and best use tests of legality, financial feasibility and maximal productivity of the property.

The tests of highest and best use are normally applied to a property both as if vacant and ready for development and as currently improved.

**HIGHEST AND BEST USE CONCLUSION**

Highest and best use for the subject is not applicable as we have been asked to value a specific use for the subject property being a 68 unit development of affordable housing.

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<sup>1</sup> The Appraisal of Real Estate, Twelfth Edition, Appraisal Institute, Page 305, 2001.



**ASSESSED VALUE & TAXES**

Current Assessed Value & Taxes are not applicable as the subject has not been severed from the parent tract. Additionally, the subject receives a tax exemption due to its religious classification.

**OTHER RELEVANT AND APPROPRIATE DATA:**

Included in the Addendum are relevant identification materials for the subject's parent tract.

**SALES COMPARISON APPROACH**

The Sales Comparison Approach is based upon the principle of substitution, which implies that a typical investor will not pay more to buy or rent a property than it would cost to buy or rent a comparable substitute property as of the valuation date.

An assumption made in this approach is that there exists a market for the property type being appraised, and that data on recent sale prices of similar, competitive properties in the same market are "arms' length" transactions which indicate a most probable sale price for the subject as an improved property, as of the valuation date. Although individual sales sometimes deviate from typical market norms, a sufficient number will tend to reflect the pattern of prices in a particular market.

There are five basic steps in the application of the Sales Comparison Approach:

- (1) *Research the market to obtain information on sales transactions, listings, and offers to purchase or sell properties that are similar to the subject property in terms of characteristics such as property type, date of sale, size, location, and zoning.*
- (2) *Verify the information by confirming that the data obtained are factually accurate and that the sales reflect arms' length market considerations. Verification may also elicit additional information about the market.*
- (3) *Select relevant units of comparison (e.g., income multipliers or dollars per acre or per square foot) and develop a comparative analysis for each unit.*
- (4) *Compare comparable sale properties with the subject property using the elements of comparison and adjust the sale price for each comparable appropriately to the subject property or eliminate the sale property as a comparable.*
- (5) *Reconcile the various value indications produced from the analysis of comparables into a single value indication or a range of value. In an imprecise market subject to varying occupancies and economies, a range of values may be a better conclusion than a single value estimate.<sup>2</sup>*

In the course of market investigation, all property sales in the market area consummated during the preceding three years were investigated and analyzed from the perspective of their utility as reliable value indicators for the subject. Few satisfied the criteria for true comparability. Those sales that best approximated the subject in physical condition, market appeal and overall utility were selected for use in the comparative analysis. These sales are briefly described as follows:

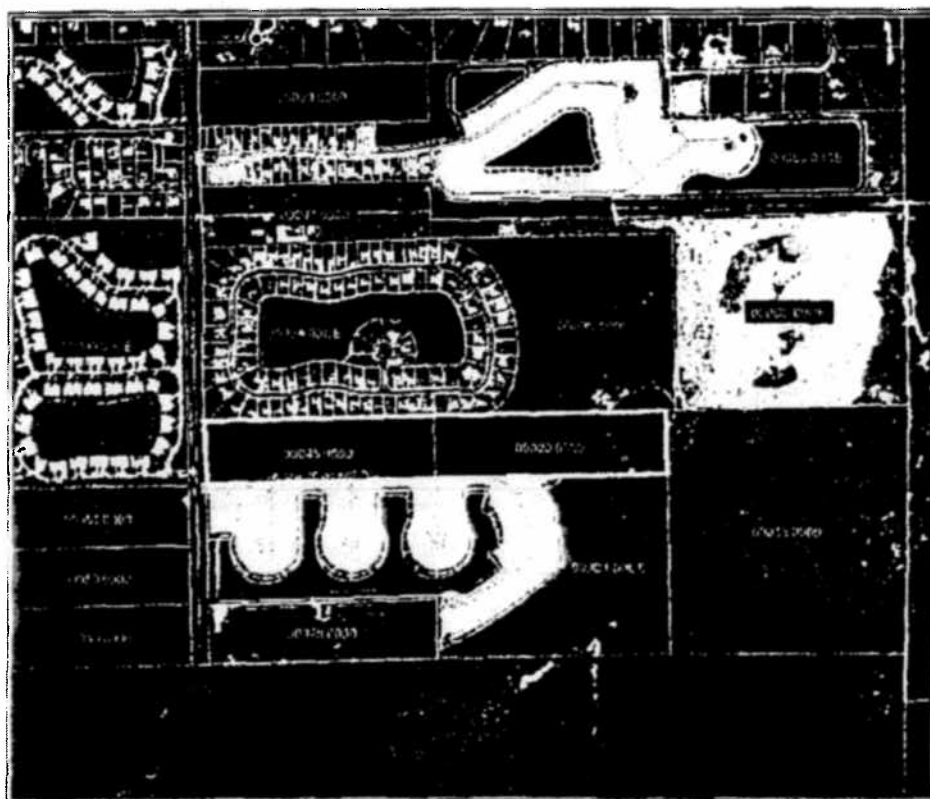
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<sup>2</sup>The Appraisal of Real Estate, Appraisal Institute, Thirteenth Edition, 2008, Pg. 301

**RESIDENTIAL ACREAGE COMPARABLE NUMBER 1**

PROPERTY TYPE:	Single-Family Residential Acreage
IDENTIFICATION:	10-46-24-01-00045.0000 and -00020.0000
LOCATION:	17801 Winkler Road, Fort Myers, Lee County.
GRANTOR:	TIB Bank
GRANTEE:	Asking
DATE OF LISTING:	February 4, 2009
RECORDED ORB:	N/A
LISTING PRICE:	\$1,495,000
FINANCING:	Conventional
CASH EQUIVALENCY:	Same as cash
SITE SIZE:	19.42 Acres
UNITS PLANNED:	43 Units
ZONING:	RPD; Residential Planned Development
PRICE/ACRE:	\$76,982/Acre
PRICE/UNIT:	\$34,767/Unit
SOURCE:	Public Records of Lee County and Steve Cunningham, rep for seller (239) 275-4922.
REMARKS:	This property is a bank foreclosure up for resale. It is vested for 43 single family units. Engineering and environmental mitigation has been completed. The previous sale was in March, 2005 for \$1,950,000, w/o vesting or plans. The listing agent reports scant interest at this price. An offer for \$500,000 (\$11,628), which the agent considered realistic, was refused by the owner.

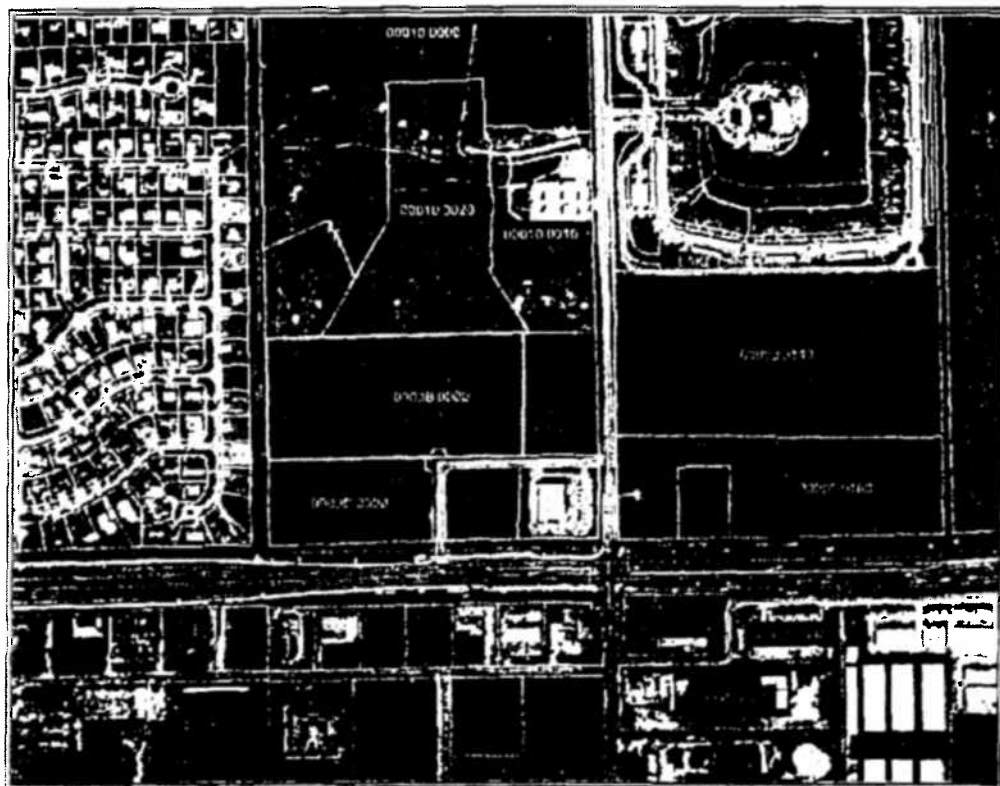
RESIDENTIAL ACREAGE COMPARABLE NUMBER 1



**RESIDENTIAL ACREAGE COMPARABLE NUMBER 2**

PROPERTY TYPE:	Multi-Family Residential Acreage
IDENTIFICATION:	A portion of 06-46-24-36-0000B.0000
LOCATION:	The west side of Pine Ridge Road, about 300 feet north of Summerlin Blvd., Fort Myers, Lee County.
GRANTOR:	Pine Ridge Investments, LLC
GRANTEE:	Asking
DATE OF LISTING:	February 4, 2009
RECORDED ORB:	N/A
LISTING PRICE:	\$3,900,000
FINANCING:	Conventional
CASH EQUIVALENCY:	Same as cash
SITE SIZE:	11.00 Acres
UNITS PLANNED:	94 Units
ZONING:	RM-8; Residential Multi-Family
PRICE/ACRE:	\$354,545/Acre
PRICE/UNIT:	\$41,489/Unit
SOURCE:	Public Records of Lee County and Michael Vincent, rep for seller (239) 454-8940.
REMARKS:	<p>This property is the western portion of a 14 acre site, with the eastern 3 acres proposed for commercial use. No plan is vested.</p> <p>The listing agent reports that the land is significantly overpriced. A realistic value range, in his opinion, is between \$10,000 and \$15,000 per unit.</p>

RESIDENTIAL ACREAGE COMPARABLE NUMBER 2



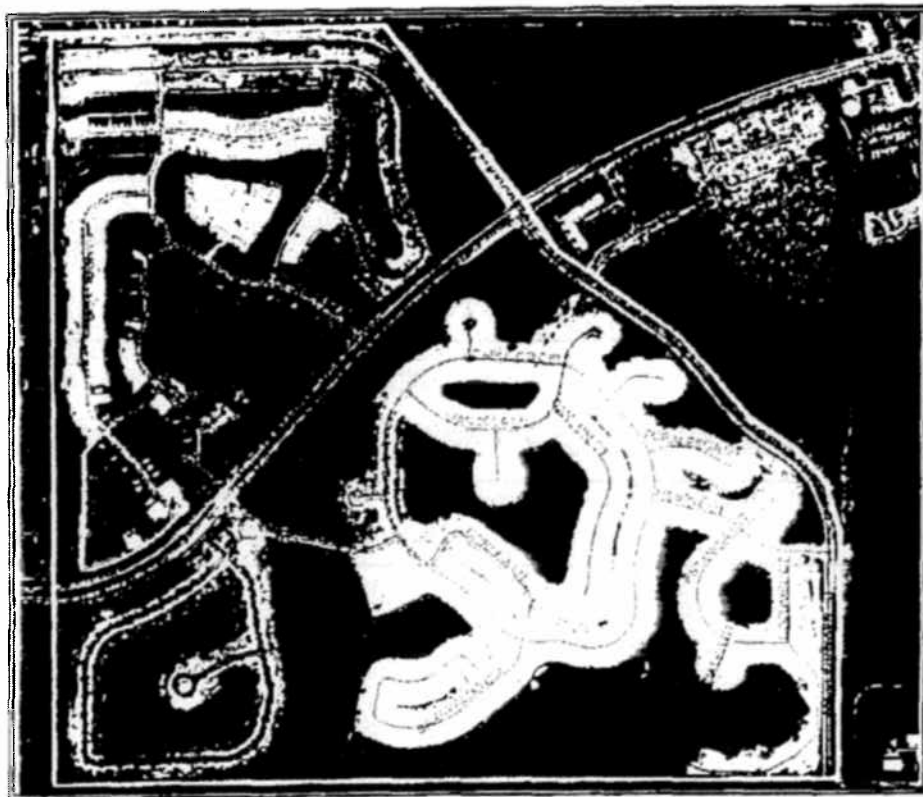
**BASS & ASSOCIATES, INC.**

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**RESIDENTIAL ACREAGE COMPARABLE NUMBER 3**

<b>PROPERTY TYPE:</b>	Bulk Residential Lots
<b>IDENTIFICATION:</b>	21-43-24-C4-00112.0610 and many others
<b>LOCATION:</b>	Various lots within the Bella Vida Subdivision, both sides of the Del Prado Extension, Cape Coral, Lee County.
<b>GRANTOR:</b>	D.R. Horton, Inc.
<b>GRANTEE:</b>	Brookwood Bella Vida, LLC
<b>DATE OF SALE:</b>	September 29, 2008
<b>RECORDED ORB:</b>	Inst. # 2008 / 000262733
<b>SALE PRICE:</b>	\$4,890,300
<b>FINANCING:</b>	Conventional
<b>CASH EQUIVALENCY:</b>	Same as cash
<b>SITE SIZE:</b>	Various; Mostly below 10,000 SF
<b>UNITS PLANNED:</b>	279 Units
<b>ZONING:</b>	R-1B; Single Family
<b>PRICE/ACRE:</b>	N/A
<b>PRICE/UNIT:</b>	\$17,528/Unit
<b>SOURCE:</b>	Public Records of Lee County and Randy Thibaut, rep for buyer, (239) 489-4066.
<b>REMARKS:</b>	This is a bulk lot sale of the remaining inventory in the developed Bella Vida subdivision. The seller is the subdivision developer and the buyer is an outside investment group. All lots have infrastructure in place, including common areas.

RESIDENTIAL ACREAGE COMPARABLE NUMBER 3



**RESIDENTIAL ACREAGE COMPARABLE NUMBER 4**

**PROPERTY TYPE:** Bulk Residential Lots

**IDENTIFICATION:** 402334304003 and many others

**LOCATION:** South side of Duncan Road, about 1/4 mile east of Belmont Road, Punta Gorda, Charlotte County.

**GRANTOR:** Beaser Homes Corp, LLC

**GRANTEE:** Brookwood Calusa Creek

**DATE OF SALE:** September 15, 2008

**RECORDED ORB:** BK 3329 PG 1957

**SALE PRICE:** \$2,695,000

**FINANCING:** Conventional

**CASH EQUIVALENCY:** Same as cash

**SITE SIZE:** Various; Generally under 10,000 SF

**UNITS PLANNED:** 224 Units

**ZONING:** RMF-12; Residential Multi-Family

**PRICE/ACRE:** N/A

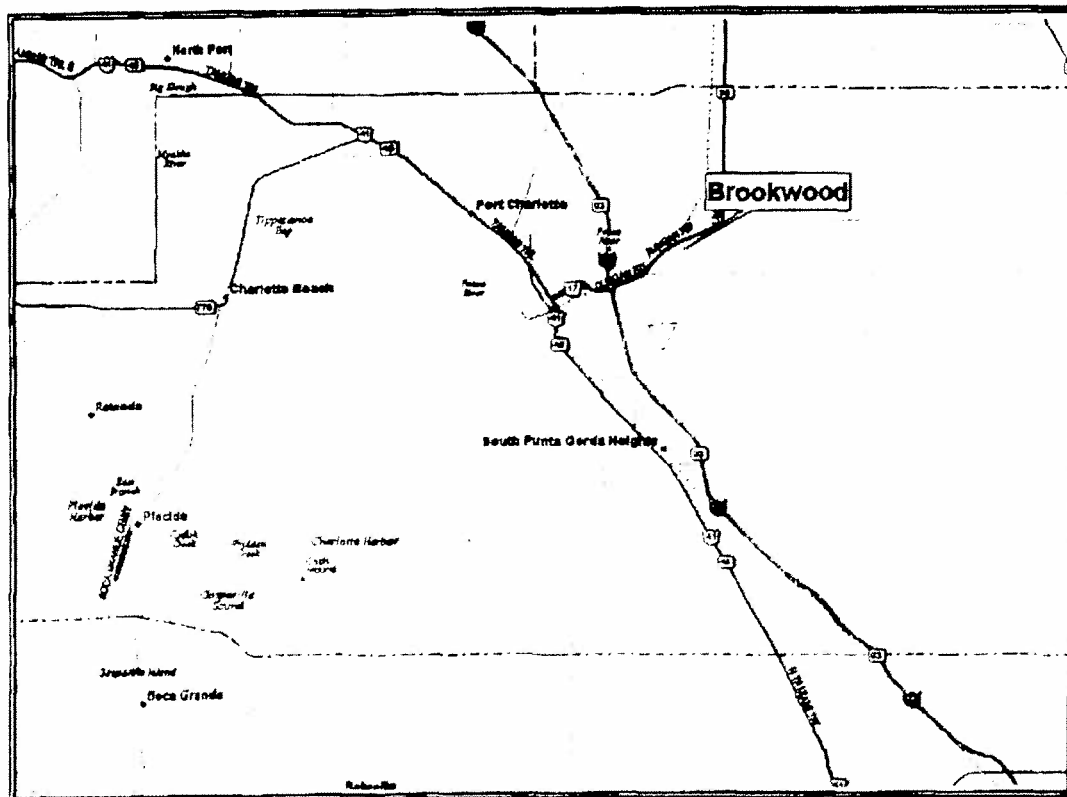
**PRICE/UNIT:** \$12,031/Unit

**SOURCE:** Public Records of Charlotte County and Randy Thibaut, rep for buyer (239) 489-4066.

**REMARKS:** This is a bulk sale of the remaining inventory in the completed Calusa Creek subdivision. It includes 106 single family lots, and 118 townhome lots. All infrastructure and common area improvements are in place. The buyer also purchased a 2.87 acre commercial tract adjacent in a separate deal. The buyer plans to gradually resell the lots to a variety of builders.



RESIDENTIAL ACREAGE COMPARABLE NUMBER 4



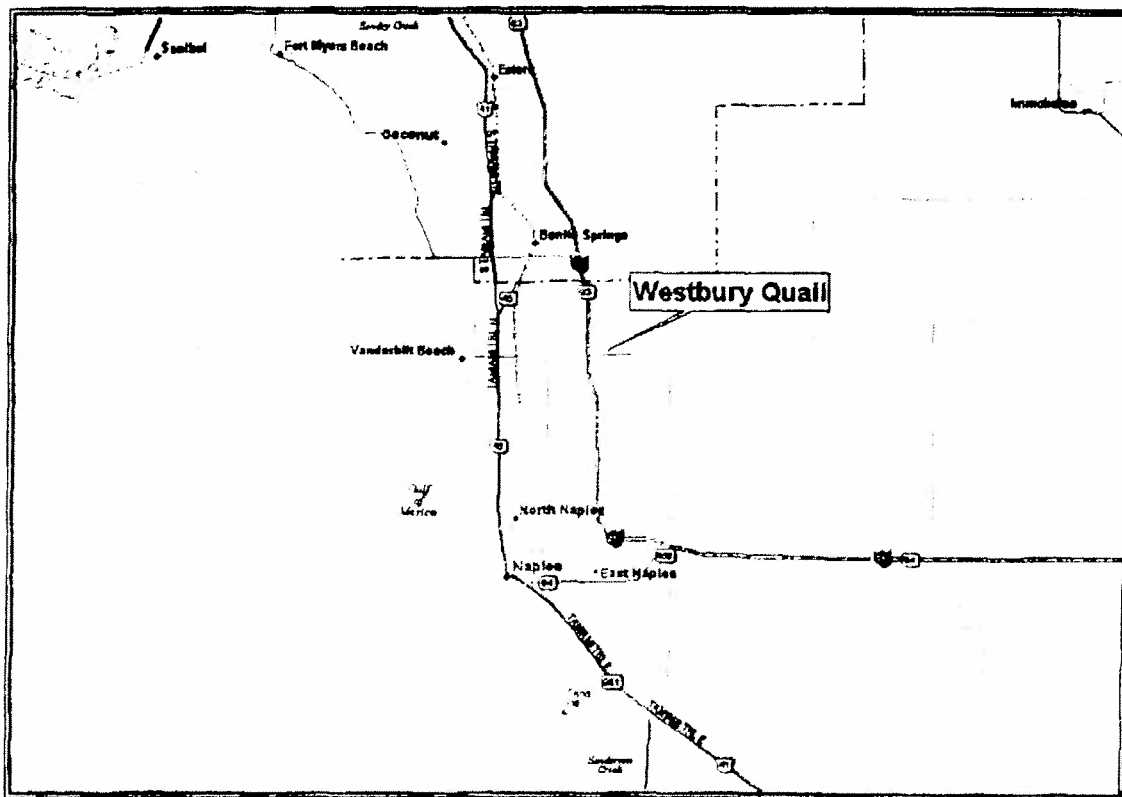
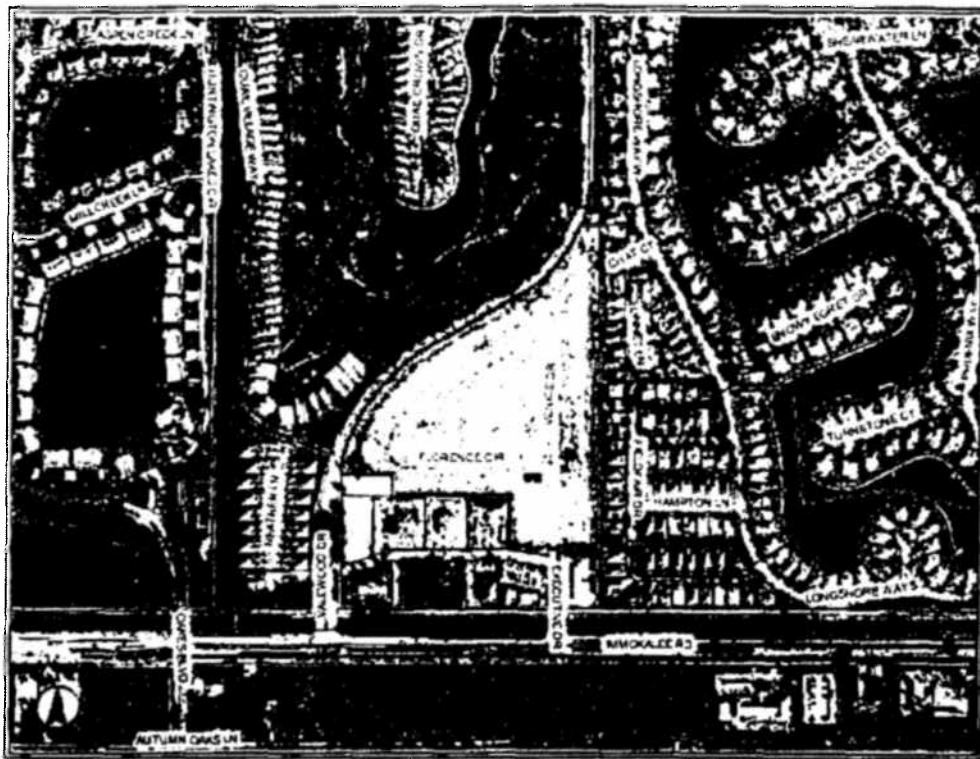
**BASS & ASSOCIATES, INC.**

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**RESIDENTIAL ACREAGE COMPARABLE NUMBER 5**

<b>PROPERTY TYPE:</b>	Multi-Family Residential Acreage
<b>IDENTIFICATION:</b>	64918000028
<b>LOCATION:</b>	The north side of Immokalee Road, about ½ mile east of Interstate 75, Naples, Collier County.
<b>GRANTOR:</b>	Toll FL V, LP
<b>GRANTEE:</b>	Westbury Quail Gardens, LLC
<b>DATE OF SALE:</b>	August 19, 2008
<b>RECORDED ORB:</b>	BK 4387 PG 3230
<b>SALES PRICE:</b>	\$5,850,000
<b>FINANCING:</b>	Conventional
<b>CASH EQUIVALENCY:</b>	Same as cash
<b>SITE SIZE:</b>	21.75 Acres
<b>UNITS PLANNED:</b>	154 Units
<b>ZONING:</b>	PD; Planned Development
<b>PRICE/ACRE:</b>	\$268,966/Acre
<b>PRICE/UNIT:</b>	\$37,987/Unit
<b>SOURCE:</b>	Public Records of Collier County and David Stephens, rep for buyer.
<b>REMARKS:</b>	This property is a residential "pod" within the Quail Creek planned development. It is fully vested and benefits from off-site amenities and stormwater retention. In addition, some underground utilities have already been constructed.

RESIDENTIAL ACREAGE COMPARABLE NUMBER 5



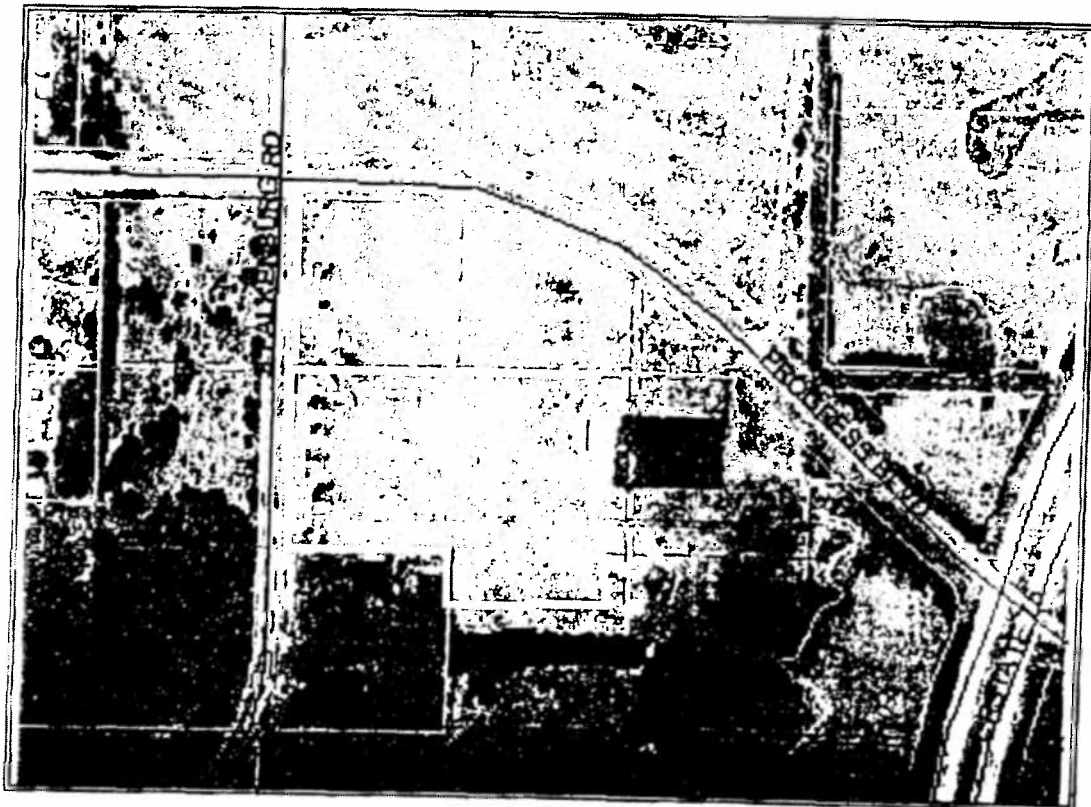
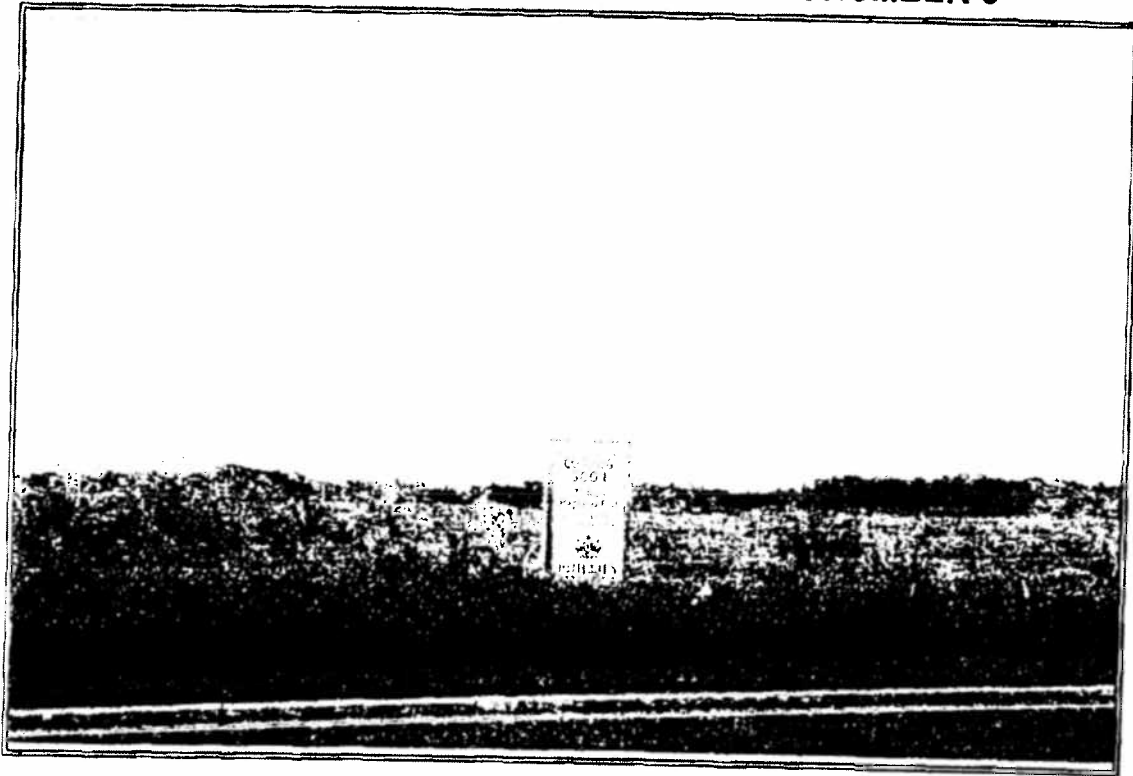
**BASS & ASSOCIATES, INC.**

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**RESIDENTIAL ACREAGE COMPARABLE NUMBER 6**

<b>PROPERTY TYPE:</b>	Multi-Family Residential Acreage
<b>IDENTIFICATION:</b>	047934.3000
<b>LOCATION:</b>	East side of Falkenburg Road, about 400 feet south of Progress Blvd., Tampa, Hillsborough County.
<b>GRANTOR:</b>	Centex Homes
<b>GRANTEE:</b>	Phillips Place at Magnolia Park, LLC
<b>DATE OF SALE:</b>	March 19, 2008
<b>RECORDED ORB:</b>	BK 18516 PG 1309
<b>SALE PRICE:</b>	\$2,862,000
<b>FINANCING:</b>	Conventional
<b>CASH EQUIVALENCY:</b>	Same as cash
<b>SITE SIZE:</b>	19.31 Acres
<b>UNITS PLANNED:</b>	292 Units
<b>ZONING:</b>	PD; Planned Development
<b>PRICE/ACRE:</b>	\$148,137/Acre
<b>PRICE/UNIT:</b>	\$9,801/Unit
<b>SOURCE:</b>	Public Records of Hillsborough County and Andy DiBlosi, rep for buyer. (813) 868-3100.
<b>REMARKS:</b>	This property is a vested pod within the larger Magnolia Park planned development, which was sold by the original developer to a separate builder. This site was vested for 300 units. Subsequent announcements indicated plans for building 292 units.

RESIDENTIAL ACREAGE COMPARABLE NUMBER 6



**RESIDENTIAL ACREAGE COMPARABLE NUMBER 7**

PROPERTY TYPE:	Residential Acreage
IDENTIFICATION:	19189.1000/9
LOCATION:	The east side of Honore Avenue, about two miles north of Univ. Parkway, Bradenton, Manatee County.
GRANTOR:	Kimball Hill Homes Florida, Inc.
GRANTEE:	Riva Trace, LLC
DATE OF LISTING:	December 19, 2007
RECORDED ORB:	BK 2240 PG 173
SALES PRICE:	\$1,118,000
FINANCING:	Conventional
CASH EQUIVALENCY:	Same as cash
SITE SIZE:	46.92 Acres
UNITS PLANNED:	86 Units
ZONING:	PDR; Planned Development Residential
PRICE/ACRE:	\$23,828/Acre
PRICE/UNIT:	\$13,000/Unit
SOURCE:	Public Records of Manatee County and Robert Alegria, buyer, (941) 359-9000.
REMARKS:	<p>Previous purchase was for \$4,200,000 on April 1, 2005, without vesting. The buyer is a local builder, now marketing single family residential homes for this site.</p> <p>This property is about 60% wetland areas with an effective area of roughly 19 acres. The planned units will be single family, but with very small lots.</p>

**RESIDENTIAL ACREAGE COMPARABLE NUMBER 8**

**PROPERTY TYPE:** Multi-Family Residential Acreage

**IDENTIFICATION:** 0071093-000200-7, 0071097-000800-7 and  
0071097-000800-7

**LOCATION:** 3380 Loveland Blvd., along the east side of  
Loveland, 1/4 mile north of Westchester Blvd.,  
Charlotte Harbor, Charlotte County.

**GRANTOR:** Lennar Homes, Inc.

**GRANTEE:** Phoenix Harbor Cove, Inc.

**DATE OF SALE:** November 30, 2007

**RECORDED ORB:** BK 3237 PG 521

**SALE PRICE:** \$1,700,000

**FINANCING:** Conventional

**CASH EQUIVALENCY:** Same as cash

**SITE SIZE:** 20.00 Acres

**UNITS PLANNED:** 200 Units

**ZONING:** RMF-10; Residential Multi-Family

**PRICE/ACRE:** \$85,000/Acre

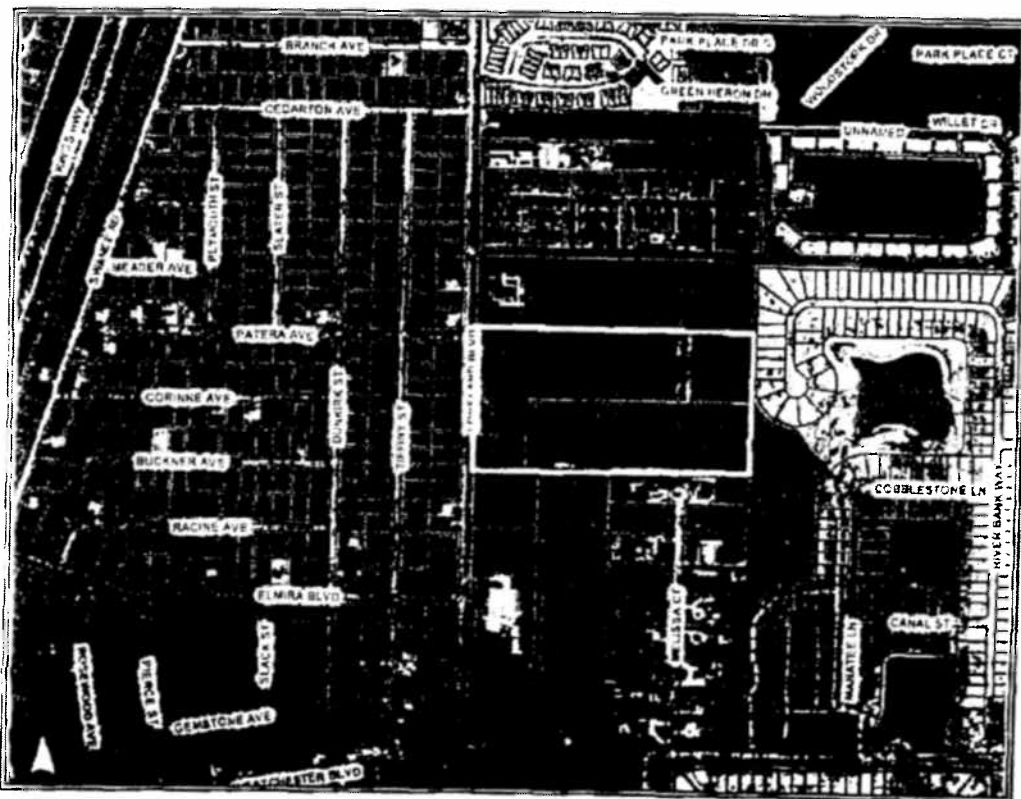
**PRICE/UNIT:** \$8,500/Unit

**SOURCE:** Public Records of Charlotte County and Don  
Cenci, rep for seller, (941) 377-1222, #1074.

**REMARKS:** This property was fully vested at sale for 200  
townhome units.

The property was subsequently re-listed for  
\$3,999,000.

RESIDENTIAL ACREAGE COMPARABLE NUMBER 8





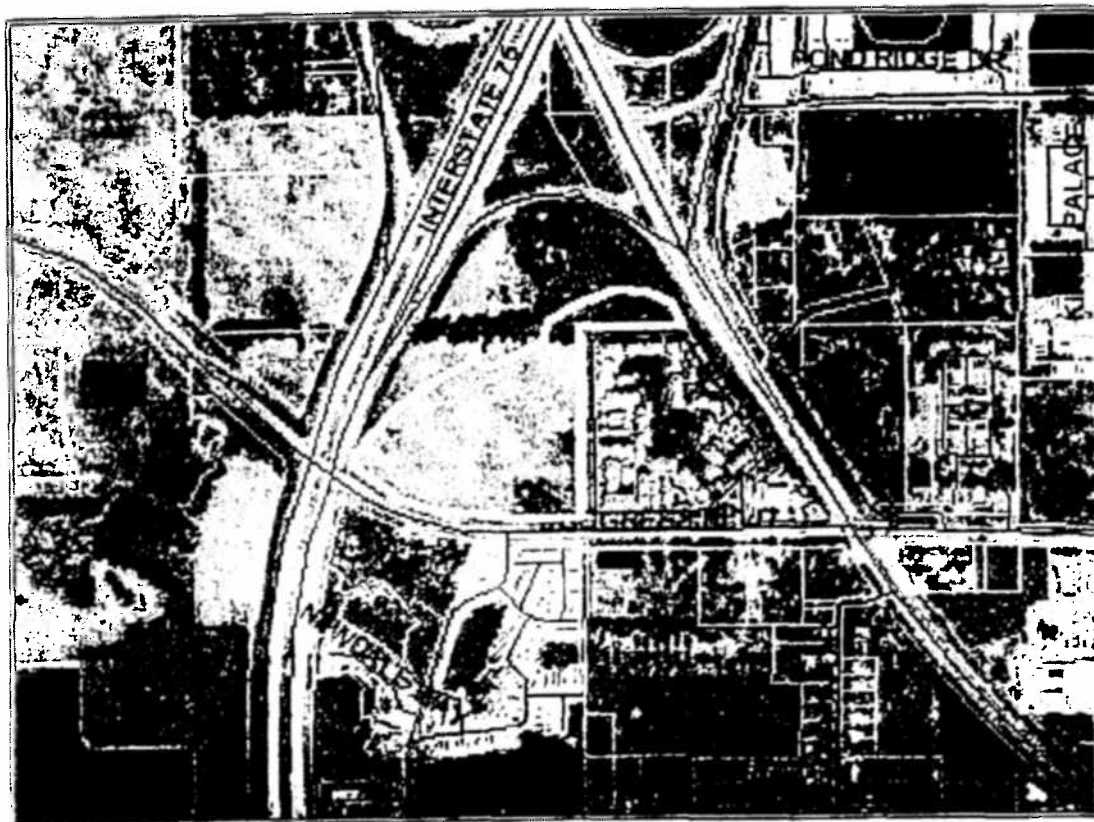
**BASS & ASSOCIATES, INC.**

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**RESIDENTIAL ACREAGE COMPARABLE NUMBER 9**

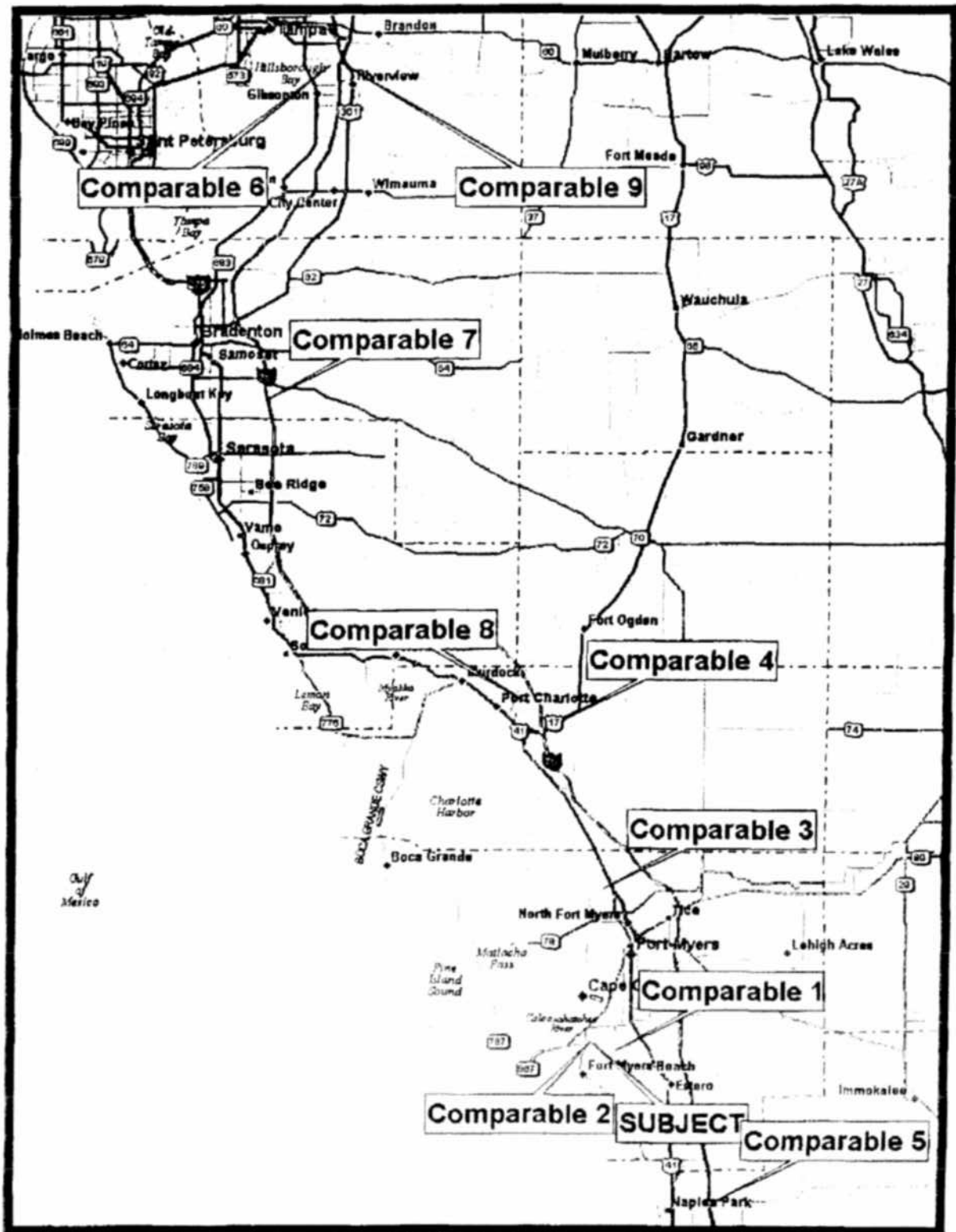
<b>PROPERTY TYPE:</b>	Multi-Family Residential Acreage
<b>IDENTIFICATION:</b>	047934.0000
<b>LOCATION:</b>	The north side of Progress Blvd, immediately east of Interstate 75, Tampa, Hillsborough County.
<b>GRANTOR:</b>	Bloomingdale Apartments, LLC
<b>GRANTEE:</b>	FC Bloomingdale Apartments, LLC
<b>DATE OF LISTING:</b>	October 17, 2007
<b>RECORDED ORB:</b>	BK 18197 PG 1600
<b>SALES PRICE:</b>	\$5,010,000
<b>FINANCING:</b>	Conventional
<b>CASH EQUIVALENCY:</b>	Same as cash
<b>SITE SIZE:</b>	29.02 Acres
<b>UNITS PLANNED:</b>	348 Units
<b>ZONING:</b>	PD; Planned Development
<b>PRICE/ACRE:</b>	\$172,640/Acre
<b>PRICE/UNIT:</b>	\$14,397/Unit
<b>SOURCE:</b>	Public Records of Hillsborough County and Sam Linsky, rep for buyer, (813) 251-5197.
<b>REMARKS:</b>	Purchased with vesting in place. Subsequently improved with a 348 unit apartment complex.

RESIDENTIAL ACREAGE COMPARABLE NUMBER 9



LAND SALES COMPARABLES  
RESIDENTIAL ACREAGE  
FILE # 00-130

OR BOOK/PAGE	SUBJECT	COMP 1	COMP 2	COMP 3	COMP 4	COMP 5	COMP 6	COMP 7	COMP 8	COMP 9
		N/A	N/A	2008 \ 262733	BK 3329 PG 1967	BK 4367 PG 3230	BK 18576 PG 1308	BK 2240 PG 173	BK 3237 PG 521	BK 18187 PG 1600
Date of Sale	Fort Myers	04-Feb-09	04-Feb-09	20-Sep-08	15-Sep-08	19-Aug-08	19-Mar-08	19-Dec-07	30-Nov-07	17-Oct-07
Location	Fort Myers	Fort Myers	Fort Myers	Cape Coral	Punta Gorda	Naples	Tampa	Bradenton	Charlotte Harbor	Tampa
Highest and Best Use	MF Residential	MF Residential	MF Residential	SF Residential	SF Residential	MF Residential	MF Residential	MF Residential	MF Residential	MF Residential
Zoning	RPD	RM-8	RM-8	R-1B	RMF-12	PD	PD	PDR	RMF-10	PD
Effective Site Size - AC	19.42	11.00	11.00	0.00	0.00	21.75	19.31	46.92	20.00	20.02
No. of Units	43	94	94	279	224	114	292	86	200	344
Density, Units per Acre	2.21	8.55	8.55	279	224	7.08	15.12	1.83	10.00	11.66
Effective Sale Price	\$1,496,000	\$3,900,000	\$3,900,000	\$4,890,300	\$2,895,000	\$5,850,000	\$2,662,000	\$1,118,000	\$1,700,000	\$5,010,000
Effective Price / AC	\$76,982	\$354,545	\$354,545	\$17,528	\$12,031	\$268,968	\$146,213	\$23,828	\$85,000	\$172,940
Effective Price / Unit	\$34,767	\$41,469	\$41,469	\$17,528	\$12,031	\$37,987	\$9,801	\$13,000	\$4,250	\$14,397
TERMS & CONDITIONS ADJUSTMENTS										
Property Rights	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Financing	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Conditions of Sale	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Adjusted Price	\$1,496,000	\$3,900,000	\$3,900,000	\$4,890,300	\$2,895,000	\$5,850,000	\$2,662,000	\$1,118,000	\$1,700,000	\$5,010,000
Adjusted Price Per AC	\$76,982	\$354,545	\$354,545	\$17,528	\$12,031	\$268,968	\$146,213	\$23,828	\$85,000	\$172,940
Adjusted Price / Unit	\$34,767	\$41,469	\$41,469	\$17,528	\$12,031	\$37,987	\$9,801	\$13,000	\$4,250	\$14,397
FEATURE ADJUSTMENTS										
Location	0.00%	0.00%	0.00%	0.00%	0.00%	-25.00%	0.00%	0.00%	0.00%	0.00%
Project Size	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Project Density	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Development Potential	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Market Conditions	0.00%	0.00%	0.00%	0.00%	0.00%	-15.00%	0.00%	0.00%	0.00%	0.00%
Zoning	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Final Adjusted Price Per AC	\$76,982	\$354,545	\$354,545	\$17,528	\$12,031	\$161,379	\$146,213	\$23,828	\$85,000	\$172,940
Final Adjusted Price Per Unit	\$34,767	\$41,469	\$41,469	\$17,528	\$12,031	\$22,792	\$9,801	\$13,000	\$4,250	\$14,397



RESIDENTIAL ACREAGE SALES LOCATION MAP

## **ADJUSTMENTS**

Adjustments are made to modify the comparables for dissimilarities with the subject parcel. Aspects for adjustment typically include terms and conditions of the sale, including property rights, financing, conditions of sale, market conditions, and adjustments for property features, including, size, location, and zoning.

### **Property Rights, Financing and Condition of Sale**

The subject is assumed to be a fee simple transfer of title, with typical financing, and an arm's length sale. All of the comparables are sales motivated by varying levels of distress or unusual seller motivation, with a consequent downward effect on the price. All, however, were also voluntary, arms' length transactions. Therefore, no adjustments of the comparables are deemed necessary for property rights conveyed, financing, or condition of sale.

### **Market Conditions**

The subject is valued as of the date of value, May 2009. The comparable properties all sold at various times within 18 months before this date. The market for residential properties has been steadily declining during that period. However, the comparables sales are all versions of clearance or distress sales, which have been uniformly low over this period. No adjustments have been made for market conditions.

### **Location**

The subject is located in Fort Myers area of unincorporated Lee County. The surrounding area is undergoing a steady process of urbanization, but also includes vacant areas as well. Long term demand for new residential units is significant, though the market for the short term is significantly oversupplied. The subject is well-placed to capture a reasonable share of projected future demand for multi-family housing in this area. All of the comparables are similarly attractive for future development, and positioned in similarly oversupplied markets. The quality of location varies among the sales, however. Most are sufficiently similar to the subject that no adjustment for location is needed. Comparable 5, located in the generally higher-priced Naples market, has been adjusted downward 25%.

### **Size of Project**

The subject contains a total of 3.25 acres, all of which are usable. The subject is proposed for 68 one bedroom dwelling units. The comparables range in size from 11.00 acres to 46.92 acres and 43 to 348 units. Typically, smaller sites sell for higher unit values. The comparables are close enough to the subject in area and project size that no adjustment could be extracted from this market data.

### **Project Density**

The subject is planned for multi-family development at an overall density of 20.9 units per acre. We know of no recent development which have developed at this density. The comparables include multi-family acreage, single family acreage and bulk lot sales and therefore vary widely in density. Generally, lower density projects will have higher values per unit, as each unit includes more land. However, there is insufficient data to extract a specific adjustment.

**Development Potential**

Both the subject and most of the comparables are neither encumbered by nor benefit from significant off-site access or development easements. Comparable 5 benefits from off-site stormwater retention, which increases its development efficiency. This sale has been adjusted downward 15%.

**Zoning**

The subject is currently designated with the CFPD, a mixed use planned development zoning district. Zoning data is contained in the addendum. All of the comparables were zoned, but with varying levels of vesting. Comparables 5 through 9 all included site plan vesting at the time of sale.

**Value Indication**

The range of comparable sale prices after consideration of adjustment(s) is from \$8,500 and \$41,489 per unit. The appraiser's task is to apply judgment and experience to estimate a value which reflects the subject's market value as of the date of value. In the present case the range of values for price per unit is rather significant.

Comparables 1 and 2 are both current listings. Both, according to their listing agents, are unrealistically priced. These comparables reflect a theoretical high point for the range of potential values for the subject. Realistically, they reflect values far higher than could be realized for the subject.

Comparable 5 is a recent sale located in the Naples area. This market is historically much higher priced than the subject market. In addition, this sale benefits from some infrastructure construction already in place at sale. This sale sets the high end of the realistic potential range for the subject.

The remaining comparables are clustered between \$8,500 and \$17,528 per unit. The comparable at the high end of this range is actually a bulk lot sale of single family units, which benefits from existing infrastructure, reflecting a higher value than could be expected for the subject. Most of the sales toward the low end of this range are multi-family acreage most similar to the subject. We estimate the most likely unit value for the subject would be near the range of the best comparables, \$10,000 per unit, most like Comparable 6. The subject is planned for development of 68 units. Multiplying this by \$10,000 indicates a total value for the proposed 68 one bedroom units is:

**MARKET VALUE OPINION  
RESIDENTIAL ACREAGE "AS IS"**

**SIX HUNDRED EIGHTY THOUSAND DOLLARS  
\$680,000**

**ADDENDUM**

**SUBJECT PROPERTY DATA**



# FUTURE LAND USE MAP

**Legend**

**Land Use Categories**

Category	Code	Description
Residential	R-1	Single-Family Detached
Residential	R-2	Medium-Density Residential
Residential	R-3	High-Density Residential
Commercial	C-1	Neighborhood Commercial
Commercial	C-2	Regional Commercial
Industrial	I-1	Light Industrial
Industrial	I-2	Medium-Density Industrial
Industrial	I-3	Heavy Industrial
Office	O-1	Office
Public	P-1	Public
Transportation	T-1	Transportation
Open Space	OS-1	Open Space
Water	W-1	Water
Unimproved	U-1	Unimproved

**Scale**

1 inch = 1 mile

**North Arrow**

North

**LEE COUNTY**  
SOUTH FLORIDA

**Lee Plan Map 1**  
Page 1 of 6

Map Date: 2000

Map Scale: 1 inch = 1 mile

Map Projection: NAD 83

Map Datum: NAD 83

Map Units: Feet

Map Contour: 10 feet

Map Elevation: 10 feet

Map Area: 100,000 square feet

Map Volume: 100,000 cubic feet

Map Weight: 100,000 pounds

Map Length: 100,000 feet

Map Width: 100,000 feet

Map Depth: 100,000 feet

Map Height: 100,000 feet

Map Temperature: 100,000 degrees Fahrenheit

Map Pressure: 100,000 pounds per square foot

Map Density: 100,000 pounds per cubic foot

Map Viscosity: 100,000 centipoise

Map Surface Tension: 100,000 dynes per centimeter

Map Refractive Index: 100,000

Map Dielectric Constant: 100,000

Map Thermal Conductivity: 100,000 watts per meter-kelvin

Map Thermal Expansion Coefficient: 100,000 per degree Celsius

Map Compressibility: 100,000 per Pascal

Map Sound Speed: 100,000 meters per second

Map Bulk Modulus: 100,000 Pascals

Map Shear Modulus: 100,000 Pascals

Map Young's Modulus: 100,000 Pascals

Map Poisson's Ratio: 100,000

Map Thermal Conductivity: 100,000 watts per meter-kelvin

Map Thermal Expansion Coefficient: 100,000 per degree Celsius

Map Compressibility: 100,000 per Pascal

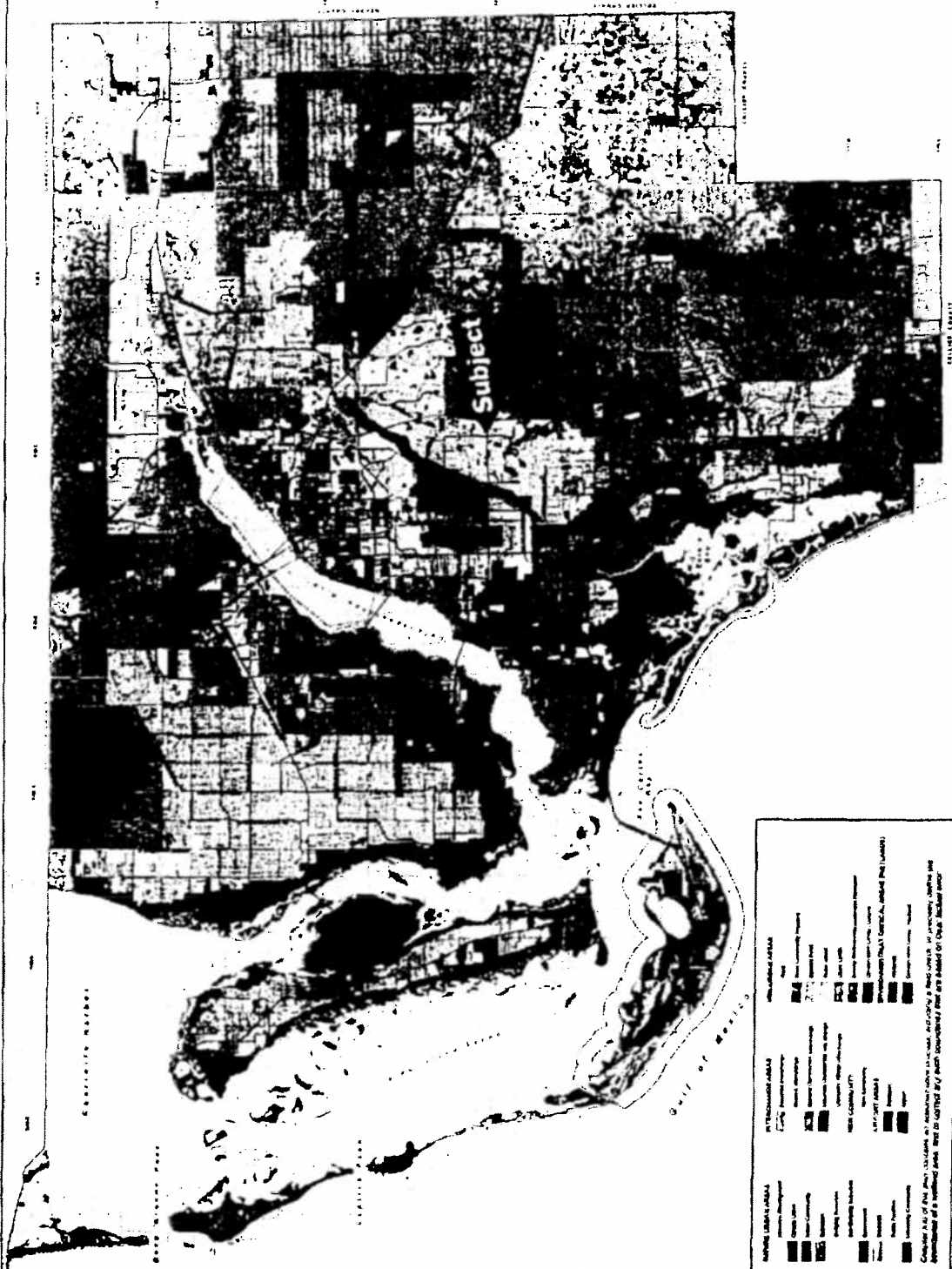
Map Sound Speed: 100,000 meters per second

Map Bulk Modulus: 100,000 Pascals

Map Shear Modulus: 100,000 Pascals

Map Young's Modulus: 100,000 Pascals

Map Poisson's Ratio: 100,000



**LEGEND**

**Land Use Categories**

Category	Code	Description
Residential	R-1	Single-Family Detached
Residential	R-2	Medium-Density Residential
Residential	R-3	High-Density Residential
Commercial	C-1	Neighborhood Commercial
Commercial	C-2	Regional Commercial
Industrial	I-1	Light Industrial
Industrial	I-2	Medium-Density Industrial
Industrial	I-3	Heavy Industrial
Office	O-1	Office
Public	P-1	Public
Transportation	T-1	Transportation
Open Space	OS-1	Open Space
Water	W-1	Water
Unimproved	U-1	Unimproved

**Scale**

1 inch = 1 mile

**North Arrow**

North

**Map Date: 2000**

**Map Scale: 1 inch = 1 mile**

**Map Projection: NAD 83**

**Map Datum: NAD 83**

**Map Units: Feet**

**Map Contour: 10 feet**

**Map Elevation: 10 feet**

**Map Area: 100,000 square feet**

**Map Volume: 100,000 cubic feet**

**Map Weight: 100,000 pounds**

**Map Length: 100,000 feet**

**Map Width: 100,000 feet**

**Map Depth: 100,000 feet**

**Map Height: 100,000 feet**

**Map Temperature: 100,000 degrees Fahrenheit**

**Map Pressure: 100,000 pounds per square foot**

**Map Density: 100,000 pounds per cubic foot**

**Map Viscosity: 100,000 centipoise**

**Map Surface Tension: 100,000 dynes per centimeter**

**Map Refractive Index: 100,000**

**Map Dielectric Constant: 100,000**

**Map Thermal Conductivity: 100,000 watts per meter-kelvin**

**Map Thermal Expansion Coefficient: 100,000 per degree Celsius**

**Map Compressibility: 100,000 per Pascal**

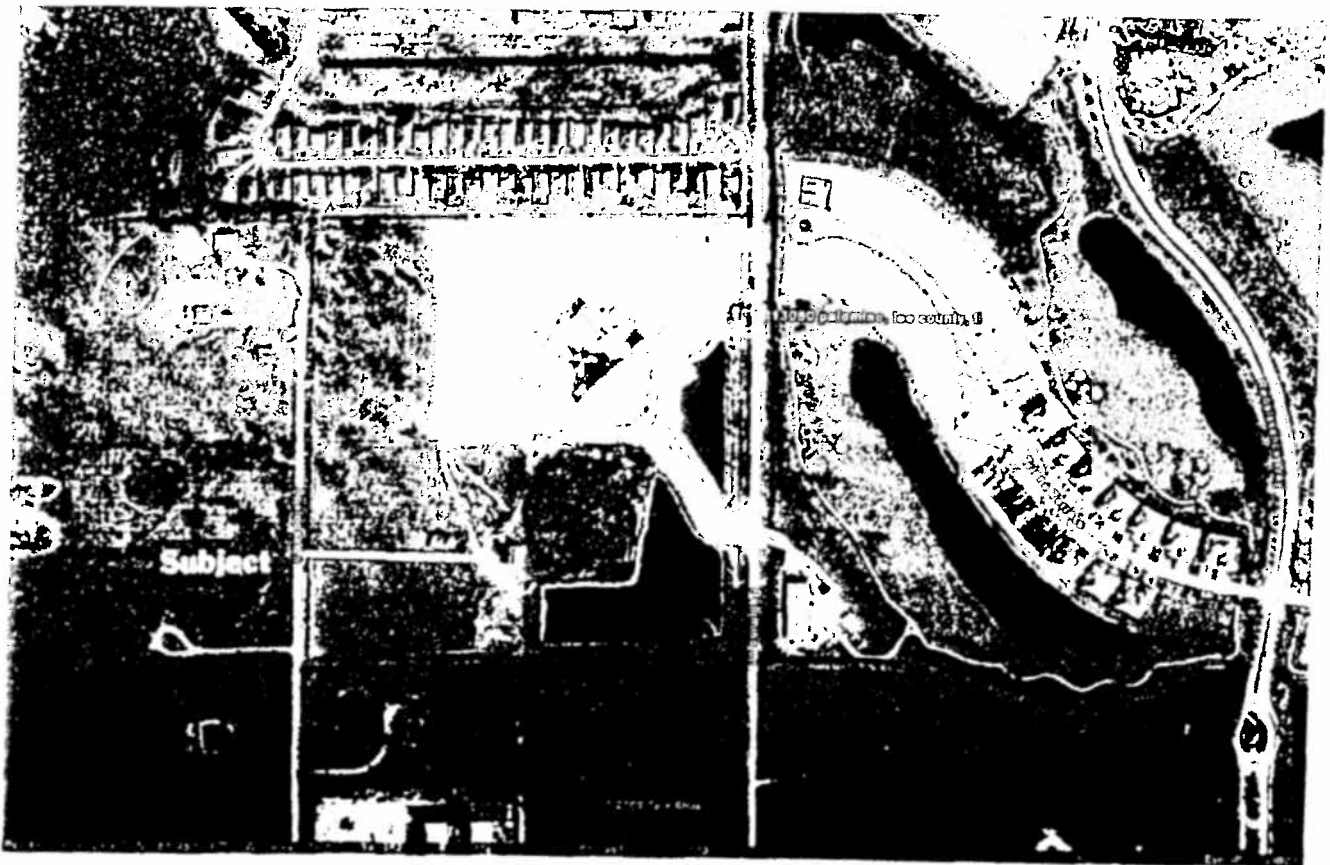
**Map Sound Speed: 100,000 meters per second**

**Map Bulk Modulus: 100,000 Pascals**

**Map Shear Modulus: 100,000 Pascals**

**Map Young's Modulus: 100,000 Pascals**

**Map Poisson's Ratio: 100,000**



## DIVISION 9. PLANNED DEVELOPMENT DISTRICTS

## Sec. 34-931. Purpose and intent.

(a) The general purpose and intent of the various planned development districts is set forth in section 34-612(2). The purpose and intent of specific planned development districts is set forth in subsections (b) through (j) of this section.

(b) *RPD residential planned development and MHPD mobile home planned development districts.*

(1) The intent of the RPD and MHPD districts is to further the general purpose of planned developments set forth in section 34-612(2) as it relates to residential areas.

(2) It is also the intent of these districts to provide a property owner or land developer with a development technique that can increase residential density and its ancillary development in areas designated by the Lee Plan as being in the rural or outer island categories, provided that the proposed development shall be completely independent of county-subsidized facilities and services, and that the project will not have an adverse economic, environmental, fiscal or social impact to its surrounding environs or to the county.

(3) The principal use of any residential or mobile home planned development is human habitation in permanent yearround dwelling units. However, the RPD and MHPD districts permit some limited nonresidential uses for the convenience of the residents and the welfare of the public.

(c) *RVPD recreational vehicle planned development district.*

(1) The purpose and intent of the RVPD district is to further the general purpose of planned developments set forth in section 34-612(2) as it relates to recreational vehicle developments.

(2) It is the intent of this chapter that all new recreational vehicle developments and any expansion to an existing recreational vehicle development shall only be permitted if first rezoned into the RVPD district.

(3) The principal use of a recreational vehicle planned development is recreational vehicle emplacement, although some ancillary commercial uses for the convenience of the development guests may also be permitted.

(d) *CFPD community facilities planned development district.* The purpose of the CFPD district is to accommodate those governmental, religious and community service activities which frequently complement and are necessary to the types of activities permitted in other zoning districts, but which, due to the size, intensity or nature of the use and the potential impact on adjacent land uses, roads or infrastructure, should not be permitted as a use by right in those districts.

(e) *CPD commercial planned development district.*

(1) The intent of the CPD district is to further the general purpose of planned developments set forth in section 34-612(2), as it relates to commercial development.

(2) The principal uses of any commercial planned development are generally the retail sale and distribution of consumer goods and services, or the provision of standard office space for various purposes, including the delivery of professional services (including health care, short of inpatient facilities), or financial services, or for the administration of

### PROPERTY INFORMATION

1) Property: 13060 PALOMINO LN, FORT MYERS FL 33912-1407 R170  
APN: 22-45-25-00-00001-0100 Strap #: 25-22-45-00-00001-0100  
Card #: 0 of 2 Mill Code: 012 Use: RELIGIOUS  
County: LEE, FL Prop Tax: \$645.14 Total Value: \$12,888,650  
Census: 401.06 Tax Yr: 2008 Delinq: Land Value: \$8,667,950  
Map Pg: 21-22 Tax Appraisal: Imprv Value: \$4,220,700  
A/M Vol/Pg 1: 2 / 0021 22 Neigh Code: 5920400 Taxable Val:  
A/M Vol/Pg 2: / Exemptions: MISC Building Val:  
T/R/S: 45-25-22 Agricult Val:  
Municipality: COUNTY Assd Yr: 2008  
Subdivision: % Improve: 33%  
Owner: DEWANE FRANK J Owner Vest: / /  
DIOCESE OF VENICE Phone:  
Mail: PO BOX 2006; VENICE FL 34284-2006 B016  
Owner Transfer = Rec Dt: Price: Doc#: Type:  
Sale Dt:

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### SALE & FINANCE INFORMATION

LAST SALE PRIOR SALE  
Recording/Sale Date: 06/07/1999 06/01/1999  
Sale Price/Type: \$368,000  
OR B&P/Stamp \$: 3127-3288  
Deed Type: WARRANTY DEED  
1st Mtg Loan \$/Type:  
1st Mtg Rate/Type/Term: / /  
1st Mtg Lender:  
2nd Mtg Loan \$/Type:  
2nd Mtg Rate/Type/Term: / /  
Title Company: OFFICER OF ASSOCIATED LAND TIT  
Transfer B&P:  
Seller: JOHNSON INA L  
New Construction:  
Other Last Sale Info = # Parcels: Type 2: Pend:

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### SITE INFORMATION

Zoning: CFPD Garage Cap#: Acres: 39.81  
County Use: 7100 Carport Area: 1,513 Lot Area: 1,733,997  
State Use: 71 Garage 2 Sqft: Lot Width:  
Bldg Class: 00 Parking Sqft: Lot Depth:  
Location Type: Parking Type: CARPORT Usable Lot Area:  
Site Influence:  
Flood Panel:  
Panel Date:  
Flood Zone:

**IMPROVEMENT INFORMATION**

County: LEE, FL

APN: 22-45-25-00-00001-0100

Gross Bldg Area:	42,101	Total Rooms:		Construction:	CONCRETE
Bldg/Living Area:	42,101	Bedrms:		Foundation:	
Total Adj Area:	37,075	Baths (Full/Half):	56	Ext Wall:	CONCRETE STUCCO
Base/Main Area:		Ttl Baths/Fixt:	56.00	Int Wall:	DRYWALL
Ground Flr Area:	30,635	Yr Built/Eff:	1980 2005	Roof Type:	CONCRETE
Basement Area:		# Stories:	1.00	Roof Matl:	METAL
\$/SF:		Fireplace/#:		Roof Frame:	REINFORCED CONCRETE
Pool Area:		Pool:		Roof Shape:	
Porch 1 Area:	2,067	Porch Type:	FINISHED/OPEN PORCH	Heat Fuel:	ELECTRIC
Porch 2 Area:	864	Patio Type:		Heat Type:	FORCED AIR
Patio/Deck 1:		Improve Type:		Parcel Fuel:	TYPE UNKNOWN
Patio/Deck 2:		Style:		Floor Type:	
Perimeter Area:				Floor Cover:	CERAMIC TILE
Heated Area:	33,285			Air Cond:	CHILLED WATER

			<u>Bldg Desc</u>	<u>Size</u>
# Bldgs:	2	Bldg #:	BAS	30635
# Res. Units:		Section #:	AOF	2650
# Comm Units:		Level #:	FOP	2067
Bldg Type:	TYPE UNKNOWN		FCP	1513
Inspect Entry:	BAS		FOP	864
Permit \$:			FOP	619
Permit #:			FOP	608
			UOP	297
			FOP	240
			FOP	176

**Extra Features**

<u>Description:</u>	<u>Unit:</u>	<u>Size/Qty:</u>	<u>Width:</u>	<u>Depth:</u>	<u>Yr Built:</u>	<u>Improve Value:</u>
SPKLR	S	38616			2005	
BLK TOP	S	225255			2005	
CH LK10	L	200			2005	
WALL DC	S	5280	880	6	2005	

**LEGAL INFORMATION**

Legal Plat BkPg:  
Legal Bk/Bldg: 1  
Legal Lot/Unit: 10  
Legal Desc: W 1/2 OF NW 1/4 OF NW 1/4 OF SEC 22 + E 1/2 OF NE 1/4 OF NE 1/4 OF SEC 21

Legal Truncated:

### PROPERTY INFORMATION

2) Property: 13060 PALOMINO LN, FORT MYERS FL 33912-1407 R170  
APN: 22-45-25-00-00001-0100 Strap #:  
Card #: 1 of 2 Mill Code: 012 Use: RELIGIOUS  
County: LEE, FL Prop Tax: \$645.14 Total Value: \$12,888,650  
Census: 401.06 Tax Yr: 2008 Delinq: Land Value: \$8,667,950  
Map Pg: 21-22 Tax Appraisal: Imprv Value: \$4,220,700  
A/M Vol/Pg 1: 2 / 0021 22 Neigh Code: 5920400 Taxable Val:  
A/M Vol/Pg 2: / Exemptions: MISC Building Val:  
T/R/S: 45-25-22 Agricult Val:  
Municipality: COUNTY Assd Yr: 2008  
Subdivision: % Improve: 33%  
Owner: Owner Vest: / /  
Phone:  
Mail:  
Owner Transfer = Rec Dt: Price: Doc#: Type:  
Sale Dt:

### SALE & FINANCE INFORMATION

	LAST SALE	PRIOR SALE
Recording/Sale Date:		
Sale Price/Type:		
OR B&P/Stamp \$:		
Deed Type:		
1st Mtg Loan \$/Type:		
1st Mtg Rate/Type/Term:	/	/
1st Mtg Lender:		
2nd Mtg Loan \$/Type:		
2nd Mtg Rate/Type/Term:	/	/
Title Company:		
Transfer B&P:		
Seller:		
New Construction:		
Other Last Sale Info =	# Parcels:	Type 2: Pend:

### SITE INFORMATION

Zoning: CFPD	Garage Cap#:	Acres: 39.81
County Use: 7100	Carport Area: 1,513	Lot Area: 1,733,997
State Use: 71	Garage 2 Sqft:	Lot Width:
Bldg Class: 00	Parking Sqft:	Lot Depth:
Location Type:	Parking Type: CARPORT	Usable Lot Area:
Site Influence:	Flood Panel:	
	Panel Date:	
	Flood Zone:	

**IMPROVEMENT INFORMATION**

County: LEE, FL

APN: 22-45-25-00-00001-0100

Gross Bldg Area:	33,285	Total Rooms:		Construction:	CONCRETE
Bldg/Living Area:	33,285	Bedrms:		Foundation:	
Total Adj Area:	35,347	Baths (Full/Half):		Ext Wall:	CONCRETE STUCCO
Base/Main Area:		Ttl Baths/Fixt:	56.00	Int Wall:	DRYWALL
Ground Flr Area:	30,635	Yr Built/Eff:	1980 2005	Roof Type:	CONCRETE
Basement Area:		# Stories:	1.00	Roof Matl:	METAL
\$/SF:		Fireplace/#:		Roof Frame:	REINFORCED CONCRETE
Pool Area:		Pool:		Roof Shape:	
Porch 1 Area:	2,067	Porch Type:	FINISHED/OPEN PORCH	Heat Fuel:	ELECTRIC
Porch 2 Area:	864	Patio Type:		Heat Type:	FORCED AIR
Patio/Deck 1:		Improve Type:		Parcel Fuel:	TYPE UNKNOWN
Patio/Deck 2:		Style:		Floor Type:	CONCRETE
Perimeter Area:				Floor Cover:	CERAMIC TILE
Heated Area:	33,285			Air Cond:	CHILLED WATER

			<u>Bldg Desc</u>	<u>Size</u>
# Bldgs:	2	Bldg #:	BAS	3063500
# Res. Units:		Section #:	AOF	265000
# Comm Units:		Level #:	FOP	206700
Bldg Type:	TYPE UNKNOWN		FCP	151300
Inspect Entry:	BAS		FOP	86400
Permit \$:			FOP	61900
Permit #:			FOP	60800
			UOP	29700
			FOP	24000
			FOP	17600

**Extra Features**

<u>Description:</u>	<u>Unit:</u>	<u>Size/Qty:</u>	<u>Width:</u>	<u>Depth:</u>	<u>Yr Built:</u>	<u>Improve Value:</u>
SPKLR	S	38616			2005	
BLK TOP	S	225255			2005	
CH LK10	L	200			2005	
WALL DC	S	5280	880	6	2005	

**LEGAL INFORMATION**

Legal Plat BkPg:  
Legal Blk/Bldg: 1  
Legal Lot/Unit: 10  
Legal Desc: W 1/2 OF NW 1/4 OF NW 1/4 OF SEC 22 + E 1/2 OF NE 1/4 OF NE 1/4 OF SEC 21

Legal Truncated:

### PROPERTY INFORMATION

3) Property: 13060 PALOMINO LN, FORT MYERS FL 33912-1407 R170  
APN: 22-45-25-00-00001-0100 Strap #:  
Card #: 2 of 2 Mill Code: 012 Use: RELIGIOUS  
County: LEE, FL Prop Tax: \$645.14 Total Value: \$12,888,650  
Census: 401.06 Tax Yr: 2008 Delinq: Land Value: \$8,667,950  
Map Pg: 21-22 Tax Appraisal: Imprv Value: \$4,220,700  
A/M Vol/Pg 1: 2 / 0021 22 Neigh Code: 5920400 Taxable Val:  
A/M Vol/Pg 2: / Exemptions: MISC Building Val:  
T/R/S: 45-25-22 Agricult Val:  
Municipality: COUNTY Assd Yr: 2008  
Subdivision: % Improve: 33%  
Owner: Owner Vest: / /  
Phone:  
Mail:  
Owner Transfer = Rec Dt: Price: Doc#: Type:  
Sale Dt:

---

### SALE & FINANCE INFORMATION

LAST SALE

PRIOR SALE

Recording/Sale Date:  
Sale Price/Type:  
OR B&P/Stamp \$:  
Deed Type:  
1st Mtg Loan \$/Type:  
1st Mtg Rate/Type/Term: / /  
1st Mtg Lender:  
2nd Mtg Loan \$/Type:  
2nd Mtg Rate/Type/Term: / /  
Title Company:  
Transfer B&P:  
Seller:  
New Construction:  
Other Last Sale Info = # Parcels: Type 2: Pend:

---

### SITE INFORMATION

Zoning: CFPD	Garage Cap#:	Acres: 39.81
County Use: 7100	Carport Area: 1,513	Lot Area: 1,733,997
State Use: 71	Garage 2 Sqft:	Lot Width:
Bldg Class: 65	Parking Sqft:	Lot Depth:
Location Type:	Parking Type:	Usable Lot Area:
Site Influence:	Flood Panel:	
	Panel Date:	
	Flood Zone:	



**IMPROVEMENT INFORMATION**County: LEE, FL  
APN: 22-45-25-00-00001-0100

Gross Bldg Area:	1,728	Total Rooms:		Construction:	
Bldg/Living Area:	1,728	Bedrms:		Foundation:	
Total Adj Area:	1,728	Baths (Full/Half):		Ext Wall:	CONCRETE STUCCO
Base/Main Area:		Ttl Baths/Fixt:		Int Wall:	DRYWALL
Ground Flr Area:	1,728	Yr Built/Eff:	1980 1980	Roof Type:	CONCRETE
Basement Area:		# Stories:	1.00	Roof Matl:	METAL
\$/SF:		Fireplace/#:		Roof Frame:	REINFORCED CONCRETE
Pool Area:		Pool:		Roof Shape:	
Porch 1 Area:	2,067	Porch Type:	FINISHED/OPEN PORCH	Heat Fuel:	ELECTRIC
Porch 2 Area:	864	Patio Type:		Heat Type:	FORCED AIR
Patio/Deck 1:		Improve Type:		Parcel Fuel:	TYPE UNKNOWN
Patio/Deck 2:		Style:		Floor Type:	CONCRETE
Perimeter Area:				Floor Cover:	CERAMIC TILE
Heated Area:	33,285			Air Cond:	CHILLED WATER

# Bldgs:	2	Bldg #:	Bldg Desc	Size
# Res. Units:		Section #:	BAS	3063500
# Comm Units:		Level #:	AOF	265000
Bldg Type:			FOP	206700
Inspect Entry:	BAS		FCP	151300
Permit \$:			FOP	86400
Permit #:			FOP	61900
			FOP	60800
			UOP	29700
			FOP	24000
			FOP	17600

**Extra Features**

Description:	Unit:	Size/Qty:	Width:	Depth:	Yr Built:	Improve Value:
SPKLR	S	38616			2005	
BLK TOP	S	225255			2005	
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WALL DC	S	5280	880	6	2005	

**LEGAL INFORMATION**

Legal Plat BkPg:  
Legal Blk/Bldg: 1  
Legal Lot/Unit: 10  
Legal Desc: W 1/2 OF NW 1/4 OF NW 1/4 OF SEC 22 + E 1/2 OF NE 1/4 OF NE 1/4 OF SEC 21

Legal Truncated:

**APPRAISERS' QUALIFICATIONS**

### **QUALIFICATIONS OF RICHARD W. BASS**

Economic conditions, land use, zoning, environmental (flora/fauna), hazardous contamination and a myriad of other development regulations and limitations all impact the valuation process. This analyst has been involved with the development of various forms of land use regulations (comprehensive plans, zoning ordinances, & sign codes), has planned projects, reviewed proposed projects from a governmental regulation viewpoint and developer viewpoint; has conducted real estate appraisals, reviewed appraisals for lenders, local governments and developers; diminution in value/detrimental condition appraisals; has conducted market studies, feasibility studies, absorption studies, project analysis, parking studies, and highest and best use studies; and, has been involved in numerous eminent domain cases including impact analysis, diminution in value case, sign valuation, appraisal review and preparation of appraisals for both the private and public sectors for litigation purposes.

### **PROFESSIONAL AFFILIATIONS/MEMBERSHIPS**

Appraisal Institute	American Economic Association
American Institute of Certified Planners	American Marketing Association
National Association of Business Economists (retired)	National Association of Master Appraisers
National Society of Appraiser Specialists	National Society of Environmental Consultants
International Association of Assessing Officers	National Golf Foundation, Professional Member

### **PROFESSIONAL DESIGNATION**

<b>MAI</b>	-	Member Appraisal Institute
<b>MSA</b>	-	Master Senior Appraiser
<b>BCBA</b>	-	Board Certified Business Appraiser
<b>EAC</b>	-	Environmental Assessment Consultant (hazardous contamination)
<b>AICP</b>	-	American Institute of Certified Planners
<b>CRA</b>	-	Certified Review Appraiser (retired)

### **STATE OF FLORIDA LICENSES**

State Certified General Real Estate Appraiser RZ 348  
Real Estate Broker License, BK No. 0378343  
General Appraiser, Instructor's Permit No. GA 1000062

### **EXPERT WITNESS**

Qualified in Federal and Florida Circuit Courts as an expert witness: Land Planner, Economist, and Real Estate Appraiser.

Topics include:	Land Planning/Zoning/Comprehensive Planning
	Economist/Marketing
	Real Estate Appraisal/Business Appraisal/Sign Valuation

### **LOCAL & STATE GOVERNMENT APPOINTMENTS**

- Past
- |                               |   |
|-------------------------------|---|
| <b>State Appraisal Board</b>  | - Expert witness for the Appraisal Board, Department of Business & Professional Regulation, State of Florida. |
| <b>Council Member</b>         | - Reinventing Government Council, Sarasota County, FL   |
| <b>Board Member</b>           | - Rosemary Redevelopment Advisory Board, Sarasota, FL   |
| <b>Special Hearing Master</b> | - Value Adjustment Board, Sarasota County, FL   |

### **LOCAL & STATE GOVERNMENT APPOINTMENTS COMMITTEES**

- Past
- |   |   |
|---|---|
| <b><u>Save Our Bays Association</u></b>       | - President, Board of Directors (local)             |
| <b><u>Parking Committee</u></b>               | - City of Sarasota Redevelopment Department (local) |
| <b><u>Technical Advisory Committee</u></b>    | - City Comprehensive Plan (local)                   |
| <b><u>School Board Advisory Committee</u></b> | - Sarasota School Board (local)                     |
| <b><u>Sarasota Chamber of Commerce</u></b>    | - Committee for Economic Development (local)        |

### **PUBLICATIONS/ARTICLES**

**If Its Zoned, Why Can't I Build On It?**, NARA/MU, 1985 Scottsdale, AZ,

**What's a Sign Worth. Death of a Retailer.** *SignsOfTheTimes*, ST Publications, Inc., 1996 Cincinnati, OH

**The Economic Worth of On-Premise Signage. Research and Valuation Techniques.** Claus, R. James; Bass, Richard W., 1998 Sherwood, OR

**Are Planners Truly Planning for the Economic Well Being of Their Community and for Themselves.** *Overview*, FPZA, 1998 Tallahassee, FL

**Sign = More Revenue, Fewer Print Ads.** *SignsOfTheTimes*, ST Publications, Inc., Jan. 1999 Cincinnati, OH

**Do Signs Economically Benefit Non-Profits?** *SignsOfTheTimes*, ST Publications, Inc., 2006 Cincinnati, OH

**Valuation of the Primary Guidance System for our Mobile Society.** *Appraising On-Premise and Other Forms of Signage for Optimal Asset Management*; Robert J. Claus, Ph.D., Edwin Baker, Richard Bass, MAI/AICP, Signage Foundation, 2001

### **SPEAKING ENGAGEMENTS**

- 1995 - Speaker, **"Sign Valuation - Case Studies"** Signs and Land Use Controls Conference, Reston, Virginia
- 1996 - Speaker, **"Sign Valuation - What's A Sign Worth?"** Identity Management Conference, Pinehurst, N.C.
- 1998 - Instructor, **"Appraisal Practices for Valuation/Evaluation of the Commercial/Retail Site and Its Signage"**, including Case Studies, Signage Foundation, Orlando, FL.
- 1998 - Speaker, **"Establishing Value for a Commercial Site's Visibility Component"**, National Sign Users Conference on Sign Regulations and Marketing, International Sign Association (ISA), Orlando FL.
- 1999 - Speaker, **"The On-Premise Business Sign, What Its Really Worth & How to Prove It"**, National City Planners & Sign Users Conference, Mid West Sign Association & Signage Foundation for Communication Excellence, Inc., Columbus, OH.
- 2000 - Speaker, **"The Value of On-Premise Signage and Dealing with Local Government"**, International Council of Shopping Centers, CenterBuild Conference, Scottsdale, AR.
- 2003 - Speaker, **"The Impact of Sign Regulation on Market Activities and Business Valuation"** Best Practices Manual Commercial and Political Place Based Speech Regulations, National Signage Research Symposium ; U.S. Small Business Administration & Signage Foundation for Communication Excellence, Inc.
- 2004 - Speaker, **"Commercial and Political Place-Based Speech Regulations"** Toward a Best Practices Manual, National Signage Research Symposium Workshop; U.S. Small Business Administration & Signage Foundation for Communication Excellence, Inc.
- 2004 - Speaker, **"The Value of On-Premise Signs"** CLE International, Tampa, Florida.
- 2005 - Speaker, **"Implementation of Best Practices in Commercial Placed-Based Signage"** National Signage Research Symposium; U.S. Small Business Administration, University of Nevada at Las Vegas College of Business, & Signage Foundation for Communication Excellence, Inc., Las Vegas, NV.
- 2006 - Speaker, **"Valuation of the Primary Guidance System for our Mobile Society, Appraising On-Premise and Other Forms of Signage for Optimal Asset Management"**, Transportation Research Board, National Academy of Science, Washington DC.
- 2006 - Speaker, **"The Advertising Value of Digital Imaging and Signage"**, Case Studies, The Signage and Graphics Summit, SGIA and ISA, Palm Harbor, FL
- 2006 - Speaker, **"Legal & Appraisal Issues"**, Signage and Identity Symposium, Las, Vegas, NV
- 2006 - Instructor, **The Sign Valuation Process and Damage Calculations;  
Time, Place and Manner Standards for Sign Regulations and Federal Compensation Requirements;  
Designing Effective Signage and Protecting the right to Use it;  
Projections and Compensation for the Value of Signage Under Federal Law;** Signage & Identity Symposium, CLE for Attorneys and Appraisers; U.S. Small Business Administration (SBA) & The Signage Foundation for Communication Excellence, Las Vegas, NV

## GENERAL AND APPRAISAL EDUCATION

- 1976 - Bachelor of Science in Urban Planning & Environmental Management
- 1980 - Transfer of Development Rights (TDR) in Florida
- 1980 - 1A-1: Principles and Practices, AIREA
- 1981 - Transfer of Development Rights (TDR) in The U.S.
- 1983 - 1A-2: Basic Valuation Procedures, AIREA
- 1983 - 1B-1: Capitalization Theory, AIREA
- 1984 - 8-3 Standards of Professional Practice, AIREA
- 1985 - 1B-B Capitalization Theory, AIREA
- 1986 - 1B-A: Capitalization Theory, AIREA
- 1986 - 2-1: Case Studies in Real Estate Valuation, AIREA
- 1986 - HP-12C Basic and Advanced Seminars, AIREA
- 1986 - Analyzing Retail Opportunities, Market & Feasibility Techniques, Georgia Institute of Technology
- 1987 - R41b Seminar
- 1987 - Rates, Ratios & Reasonableness, AIREA
- 1987 - 1986 IRS Tax Code & Real Estate Property Valuation, AIREA
- 1987 - 4: Litigation Valuation, AIREA
- 1988 - Retail Market Analysis-CBD's & Neighborhood by the Georgia Institute
- 1988 - Retail Market Analysis, Georgia Institute of Technology, Atlanta, GA.
- 1989 - Professional Practice, Society of Real Estate Appraisers, Sarasota, FL.
- 1990 - Environmental Assessments for Real Estate; MCC, Bradenton, FL.
- 1991 - Strategic Retail Market Analysis; Georgia Institute of Technology
- 1991 - 8-2: Residential Valuation Appraisal Institute.
- 1991 - Core Law; Florida Real Estate Commission
- 1992 - Standard of Professional Appraisal Practices Parts A & B, Appraisal Institute
- 1992 - EPA's Underground Storage Tank Requirements; Environmental Resource Center
- 1992 - Environmental Site Assessment; Lincoln Graduate Center
- 1993 - Professional Standards, USPAP Update, Core Law For Appraisers, Appraisal Institute
- 1994 - Comprehensive Appraisal Workshop, Ted Whitmer, Dallas, Texas.
- 1994 - Americans With Disabilities Act (ADA) Seminar, Appraisal Institute, Ft. Myers, FL
- 1994 - Sign Regulations, AICP, Chicago, IL
- 1995 - Highest & Best Use and Market Analysis Appraisal Institute, Tampa, FL
- 1996 - Core Law Review Seminar, Sarasota FL
- 1997 - Principles of Business Appraisal, Lincoln Graduate Center, NAMA, Orlando, FL
- 1998 - Transaction Brokerage & Agency, Florida Association of Realtors, Sarasota, FL
- 1998 - Valuation of Detrimental Conditions in Real Estate, Appraisal Institute, Miami, FL
- 1998 - 430: Standards of Professional Practice, Appraisal Institute, Tampa, FL
- 1998 - Appraisal Practices Valuation/Evaluation of Commercial/Retail Site & Signage, Appraisal Institute, Orlando, FL
- 1999 - 1999 USPAP Review, The Appraisal Foundation, Washington, DC.
- 1999 - 1999 USPAP Instructor Training, The Appraisal Foundation, Washington, DC.
- 1999 - Instructor Seminar, Florida Real Estate Commission & Real Estate Appraisal Board, Bradenton, FL
- 1999 - Florida Core Law, Florida Real Estate Commission, Bradenton, FL
- 1999 - Brokers Continuing Education, Real Estate, Sarasota, FL
- 2001 - 2001 USPAP Update for Instructors & Regulators, Appraisal Foundation, Orlando, FL
- 2001 - Property Tax in Florida, Lorman Education Services, Sarasota, FL
- 2001 - Developing Golf Courses and Residential Communities, ULI, Charleston, SC
- 2001 - Apartment Appraisal, Appraisal Institute, Tampa, FL
- 2001 - Comprehensive Appraisal Workshop, Ted Whitmer, Tampa, FL
- 2001 - Realtor's Core Law Update, Real Estate Education Company, Sarasota, FL
- 2001 - 430 Standards of Professional Practice, Part C, Appraisal Institute, Tampa, FL
- 2002 - 800: Separating Real Property From Intangible Business Assets, Appraisal Institute, Boca Raton, FL
- 2002 - Environmental/Property Damage/Standards/Due Diligence, Valuation Strategies, Appraisal Institute, Toronto, CA
- 2003 - Instructors Continuing Education Seminar, Florida Real Estate Appraisal Board, Kissimmee FL
- 2004 - Brokers Continuing Education, Real Estate, Sarasota, FL
- 2004 - The Appraisal of Real Estate Conference, CLE International, (Faculty member) Tampa, FL
- 2004 - Business Practices and Ethics, Appraisal Institute, Boca Raton, FL
- 2004 - Inverse Condemnation, An Appraiser's Dilemma, Appraisal Institute, Boca Raton, FL
- 2004 - USPAP Update, McKissock, Sarasota, FL
- 2004 - USPAP Core Law, McKissock, Sarasota, FL
- 2004 - Appraisers Liability in Residential Appraising, Appraisal Institute, Venice, FL
- 2004 - Appraising the Appraisal: Understanding the Appraisal Review Process, Aba, Appraisal Institute, Sarasota, FL
- 2005 - 2005 Instructors Continuing Education, Core Law Update, Appraiser License Law Update, FREC & FREA, Sarasota, FL
- 2005 - The Professional's Guide to the URAR Form Report, Appraisal Institute, Ft. Myers, FL
- 2005 - 26th Annual Legal Seminar, IAAO, Chicago, IL
- 2006 - Litigation Valuation, Appraisal Institute, Chicago, IL
- 2006 - USPAP Update, McKissock, Sarasota, FL
- 2006 - Eminent Domain, CLE International, Tampa, FL
- 2007 - 2007 Instructors Continuing Education, Core Law Update, Appraiser License Law Update, REC & FREAB, Sarasota, FL
- 2007 - Valuing Real Estate in a Changing Market, Institute of Real Estate Studies, Sarasota, FL.
- 2007 - Analyzing Distressed Real Estate, Appraisal Institute, Sarasota, FL.
- 2008 - Florida State Law Update for Real Estate Appraisers, AI, St. Pete, FL
- 2008 - Florida Supervisor Trainee Roles and Rules, AI, St. Pete, FL
- 2008 - AI-100 Summary Appraisal Report Residential, AI, Sarasota, FL
- 2008 - Inspecting the Residential "Green House", AI Rotonda, FL
- 2008 - National USPAP Update, AI, Sarasota, FL

**Diocese of Venice**

**Commitment to Pay Off-site Costs**



**DIOCESE OF VENICE IN FLORIDA**  
**Office of the Chancellor**

September 24, 2009

Jim Branson  
Multifamily Division  
US Department of HUD  
Charles Bennett Federal Building  
400 W Bay Street, Suite 1015  
Jacksonville, FL 32202-1015

RE: Commitment to Pay Off-Site Costs  
Sponsor: Diocese of Venice (Dun No. 147051296)  
Project: Blessed Pope John XXIII Manor, Ft. Myers FL

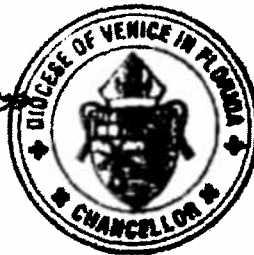
Dear Mr. Branson:

The Sponsor understands that the HUD funding cannot be used to pay for the cost to rezone the property nor to pay for off-site expenses. This letter shall serve as a commitment from the Diocese to Venice to pay for these costs, as described on the attached sheet. The Diocese will likely pay for these from land proceeds received in conjunction with this project.

The Diocese has enjoyed a strong working relationship with the HUD office in Jacksonville for many years and it is our hopes that we will again have the opportunity to work with your office on another HUD Section 202 project.

Sincerely yours,

Dr. Volodymyr Smeryk  
Chancellor



Enclosure

cc: Father Bob Tabbert





6810 Porto Fino Circle  
Fort Myers, FL 33912  
Phone 239-433-4231 Fax 239-433-9632  
[www.tdmcivilengineering.com](http://www.tdmcivilengineering.com)

March 6, 2009

**Reference: Blessed Pope John XXIII**

**COST ESTIMATE**

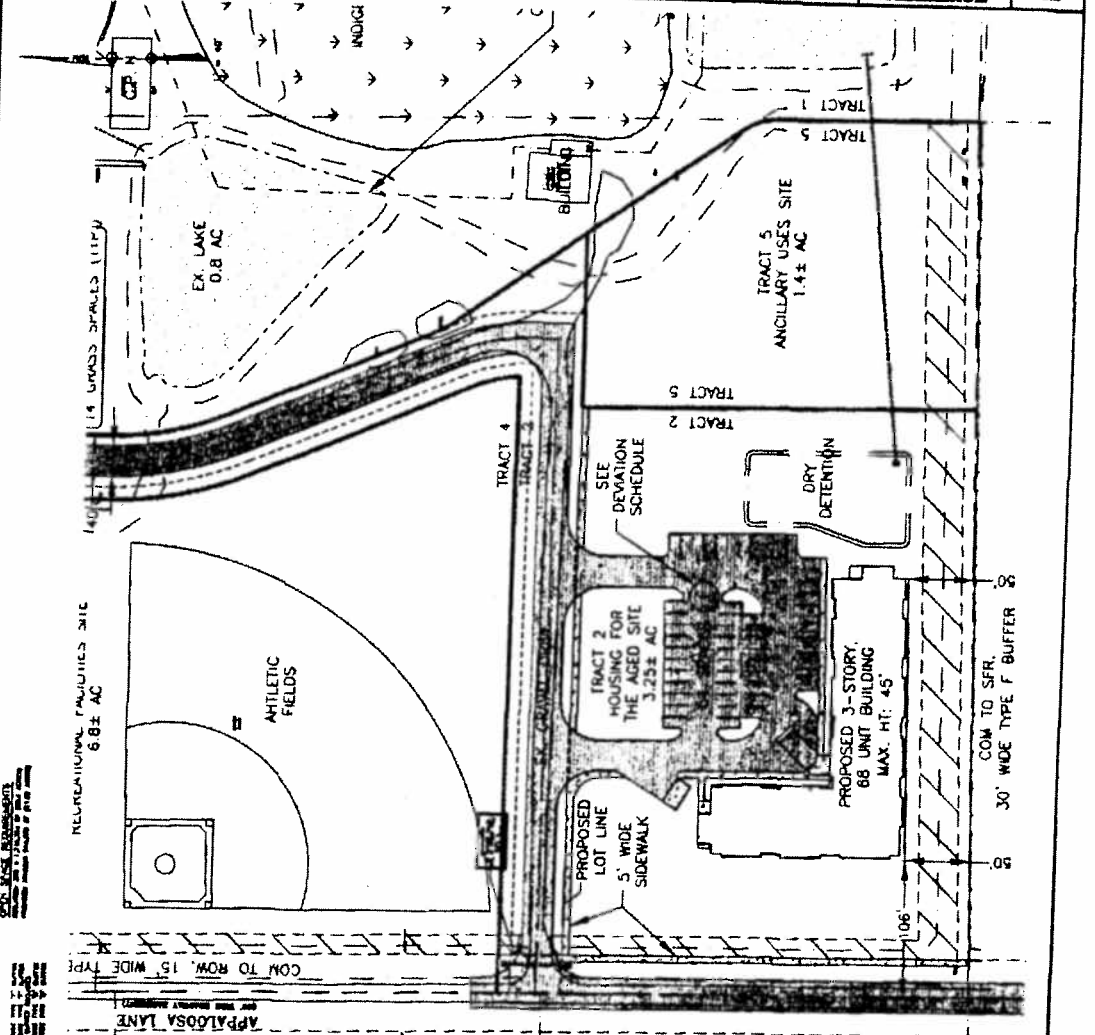
**Zoning:**

Updated Boundary Survey	\$ 3,500
Updated Environmental and Protected Species Survey	\$ 2,900
TDM Consulting fees	\$21,500
Submittal fee to Lee County BOCC	\$ 9,576
<b>Total</b>	<b>\$37,476</b>

**Estimates on Anticipated Site Improvements:**

Pave Appaloosa to Lee County standards for local roads	\$50,000-\$60,000
Pave interior shell road to Lee County standards for private roads	\$45,000-\$55,000
Extend sewer to lift station	\$20,000-\$30,000
Extend sewer lines from church to lift station	\$15,000-\$20,000
Church connection fees paid to Lee County Utilities	\$53,000
<b>Total</b>	<b>\$130,000-\$218,000</b>

## **SITE PLAN**



<p><b>ADJACENT PROPERTY</b> ZONING: AG-2 USE: SFR</p>	<p><b>ADJACENT PROPERTY</b> ZONING: AG-2 USE: SFR</p>	<p><b>ADJACENT PROPERTY</b> ZONING: AG-2 USE: SFR</p>
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**ARCHITECT'S  
PROJECT NARRATIVE  
SITE/UNIT PLANS**

## **Architectural Narrative**

### **Blessed Pope Paul XXIII, Ft. Myers, FL Diocese of Venice**

#### **INTENT**

Narrative description of the building design including the description of the number of units with bedroom distribution, and any special design feature, amenities, community space, and how this design will facilitate the delivery of services in an economical fashion and accommodate the changing needs of residence over the next 10-20 years.

#### **SCOPE**

The proposed project is a three-story facility located on just over a three acre site in Ft. Myers with access from Appaloosa Lane, just north of Daniel Parkway. This access will be for residents and visitors and an access for service to the facility.

The facility will contain 68 one-bedroom apartment units for elderly residents. Approximately sixty (60) parking spaces will be provided.

Five percent of the units will be designed to be accessible in accordance with the Uniform Federal Accessibility Standards and other applicable requirements. Two percent of the units will be designed for the visually and hearing impaired.

#### **DESIGN CONCEPT**

The concept is based on an efficient and easily understood layout with a clear main entry lobby protected by a covered vehicular drop-off. The design includes providing sufficient natural light for a feeling of "openness" to reflect our Florida environment.

**Community Spaces** are being provided in the main core of the facility as well as additional seating areas throughout the facility, both interior and exterior, to encourage interaction between residents in a healthy manner:

- **Lobby / Seating Areas** – It is important that well placed seating areas be provided both in the interior and exterior of the facility. These areas will be placed in various locations throughout the facility, including adjacent to elevators, near laundry areas and an exterior covered patio. These seating areas will encourage activities for the residents.
- **Multi-Purpose Room** – A large multi-purpose room with serving kitchen is being provided as a main central element of the facility, easily accessible from the lobby and elevator, with an exterior patio to enhance resident activities. This room will allow for a variety of functions requiring chairs for classroom/meeting style settings, with flexibility for tables and chairs for other functions which could include dinners, receptions and other similar activities.
- **Mediation / Activity Areas** – In order to provide a variety of communal spaces, there are various mediation/lounge/activity areas for residents to have a more private or quiet environment to read or craft or incorporate some other similar functions, while still enjoying the exterior nature of the facility.

- **Other Community Space** – Every community space is designed to encourage social interaction including laundry areas, open hallways, and mail area. These spaces will allow for residents to meet and spend time with each other.

**Support Spaces** are being provided in order to properly service the residents and enhance their comfort and security:

- **Resident Counter** – A counter at the lobby, next to the Manager's Office, will be provided. This function will allow for proper monitoring of the entry, as well as visitors.
- **Manager's Office** – Adequate office space will be provided for the Facility Manager to perform their functions. This space will be located adjacent to the lobby with full view of the entry.
- **Laundry Areas** – The facility will provide laundry areas on each of the floors. These facilities will include coin-operated washers and dryers, as well as folding tables. The location of these facilities is in the central part of the facility for ease of use.

**Unit Design** facilitates the changing healthcare needs of the tenants in order to allow continued occupancy throughout their aging process.

The project is designed to be efficient and cost-effective with high importance given to the meeting the specialized needs of the elderly.

Each of the 68 resident apartments will not exceed 540 net square feet of area in a one-bedroom design. Natural light and ventilation is achieved through the use of large operable windows with blinds. Each living unit will have its own independent heating and air-conditioning system. Thermostats in each living unit will allow individual tenants to set their own preferences with respect to comfort and energy consumption. Units are designed to be flexible and to maximize openness and individuality in furniture layout.

The use of a standardized unit design allows for easy modification of cabinetry, fixtures and furnishings to address the needs as the resident population ages. Standardized cabinetry design will provide for easy removal of the lower cabinets in the kitchen to facilitate wheelchair accessibility should individual tenants need this accommodation in the future. The individual living units have been designed to adapt for complete handicap accessibility should the need arise.

In addition, standardized units allow for easier maintenance especially with regards to replacing fixtures and equipment.

Although all units can be made ADA accessible, as required a minimum number of units will be built initially to meet the specific ADA requirements for the handicap. Modified showers, bathrooms, cabinetry, and associated fixtures and appliances will be provided for ADA accessibility.

As a good design practice, lever-type hardware will be utilized throughout the project for use by all residents and all units will have wood blocking within applicable walls for installation of future additional grab bars if required. Also units will be provided for the hearing and visually impaired and the unit design is such that any unit can be converted for the visually or hearing impaired.

All the units will be wheelchair accessible for ingress/egress, and all units will have emergency call capabilities. To summon help in an emergency, two call cords will be located in each apartment, one in the bathroom where most accidents occur, and one in the bedroom. When a cord is pulled, a light turns on outside the unit and an alarm sounds to alert the manager or security personnel. A monitor panel will automatically designate which apartment is calling through audio and visual commands.

Another security device for residents' safety is a mailbox "stat check" system. Every resident will move a button located on the mailbox to let management know that all is well. Every day, the manager checks the mailboxes, and if a resident has not moved this button, a routine safety check is done.

## **MATERIALS / DESIGN ELEMENTS**

Each of the community spaces will incorporate elements that enhance the residential nature of the facility, as well as the safety of the residents:

- Comfort and security
- Noise control
- Natural lighting / openness to exterior
- Contrasting materials for visually impaired residents
- Adequate lighting, appropriate for a variety of activities
- Side / grab rail when necessary
- Floor finishes that allow easy of movement and maintenance
- Identification systems
- Integrated exterior / interior spaces

The design will be sensitive to the needs and use by the residents in order to maximize their comfort and social activities.

## **VISIT-ABILITY AND UNIVERSAL DESIGN**

This facility will embrace the concept of visit-ability with 100 percent of the units incorporating visit-ability standards. These include the entrance to the ground floor being at grade level, approached by accessible routes including sidewalks. All units will have a minimum door width, including interior passage, of at least 2 feet 10 inches, allowing 32 inches of clear passage space. Additionally, all units will have a 32" clear path to the bathroom.

Universal design in all of its Section 811/202 projects is a HUD goal. Universal design, as defined by the Center of Universal Design, is to "design products and environments to be usable by all people, to the greatest extent possible, without the need for adaptation or specialized design". The proposed project will be designed in a manner consistent with the Center of Universal Design's principles, which include:

- **Principle One of Equitable Use:** The design is useful and marketable to people with diverse abilities.
  - Provide the same means of use for all users: identical whenever possible; equivalent when not.
  - Avoid segregating or stigmatizing any users.
  - Provisions for privacy, security, and safety should be equally available to all users.
  - Make the design appealing to all users.
- **Principle Two of Flexibility in Use:** The design accommodates a wide range of individual preferences and abilities.
  - Provide choice in methods of use.
  - Facilitate the user's accuracy and precision.
  - Provide adaptability to the user's pace.
- **Principle Three of Simple and Intuitive Use:** Use of the design is easy to understand, regardless of the user's experience, knowledge, language skills, or current concentration level.
  - Eliminate unnecessary complexity.
  - Accommodate a wide range of literacy and language skills.
  - Arrange information consistent with its importance.

- **Principle Four of Perceptible Information:** The design communicates necessary information effectively to the user, regardless of ambient conditions or the user's sensory abilities.
  - Use different modes (pictorial, verbal, tactile) for redundant presentation of essential information.
  - Provide adequate contrast between essential information and its surroundings.
  - Maximize "legibility" of essential information.
  - Provide compatibility with a variety of techniques or devices used by people with sensory limitations.
- **Principle Five of Tolerance for Error:** The design minimizes hazards and the adverse consequences of accidental or unintended actions.
  - Arrange elements to minimize hazards and errors; most used elements, most accessible; hazardous elements eliminated, isolated, or shielded.
  - Provide warnings of hazards and errors.
- **Principle Six of Low Physical Effort:** The design can be used efficiently and comfortably and with a minimum of fatigue.
  - Use reasonable operating forces.
  - Minimize repetitive actions.
  - Minimize sustained physical effort.
- **Principle Seven of Size and Space for Approach and Use:** Appropriate size and space is provided for approach, reach, manipulation, and use regardless of user's body size, posture or mobility.
  - Provide clear line of sight to important elements for any seated or standing user.
  - Make reach to all components comfortable for any seated or standing user.
  - Provide adequate space for the use of assistive devices of personal assistance.

## PROVISION FOR SUPPORTIVE SERVICES

As described below, the design of the building will accommodate the "Aging in Place" process. However, the sponsor is taking steps in the initial design to provide spaces that will accommodate needed supportive services for the residents.

The building's design concept provides for rooms that will serve multiple functions, a feature that enhances the efficiency of the development. Space will be available for visiting health professionals to conduct periodic health screenings such as blood pressure checks, blood sugar screening, cholesterol screening, etc. The sponsor will make arrangements for other visiting professional screenings such as podiatrists and ophthalmologists.

Other planned supportive services include educational activities for the residents, including nutritional education, lectures, book clubs, language classes, fire safety programs and self defense measures. Again, these programs will be conducted in centrally located rooms designed to be multi-functional.

## AGING IN PLACE

This facility, including the individual units, will be equipped with grab bars, emergency call systems, and non-slip floor surfaces, along with the other design elements which facilitate individual safety. Although five percent of the units will be designed at the outset as accessible by disabled persons, all units will be designed to be adaptable for various types of disabilities, including wheelchair usage, and sight and hearing impairments. Hardware selections will include items which take into consideration the aging process (e.g., units will have door levers as opposed to knobs). The units will be sized such that there is sufficient space for services delivered in the home such as assistance with bathing, meal preparation, medication administration



and similar types of assistance. Walking distance to community facilities will be minimized to the extent possible and seating accommodations will be available in waiting areas.

Being cognizant of the aging process, various design elements will be incorporated into the design in order to alleviate this concern, including:

- **Visual Signage** – Colors will be chosen which are “friendly” to the aging eye and signs will have a high contrast ratio. This will allow for a greater feeling of personal security among residents who are visually impaired, hearing impaired (and thus more reliant on visual signals), as well as those who suffer from disorientation.
- **Glare Reduction** – Glare is a major problem among elderly persons with deteriorating eyesight. Non-reflective materials will be used on floor and wall surfaces, both interior and exterior, as well as within the unit on such items as appliances whenever possible.
- **Furniture Placement** – The careful placement of furnishings can be used to overcome social isolation and to aid the hearing-impaired. Background noise is a constant problem for persons with hearing impairments. Careful placement of small furniture groupings can make personal conversations possible, within a large room, while encouraging socialization among residents.

#### CONFORMANCE WITH LOCAL CODES

The enforceable codes for this project include the latest Florida Building Code Revisions adopted in 2007 as well as the fire protection statutes of NFPA. Some of the provisions include the necessary means of egress, distance from a living unit to the exit, length of corridors between exits and fire ratings of all separation doors and walls.

#### UTILITY COMBINATION

The project will utilize electricity for cooking, air conditioning and lighting. It is proposed that each apartment be individually metered for electricity. All utilities are available at the site.

#### DESIGN FEATURES WHICH PROMOTE ENERGY EFFICIENCY AND EFFICIENT CONSTRUCTION

HUD is encouraging applicants to take specific energy-saving actions in furtherance of HUD's Energy Action Plan described in the August 2006 report to congress entitled: “Promoting Energy Efficiency at HUD in a Time of Change.” Under this policy priority, HUD is providing up to two policy priority points as follows:

- a) **Energy Star Appliances and Products.** Applicants can receive one policy priority point for incorporating energy-efficiency measures in the design, construction and operation of the development. HUD strongly encourages the purchase and use of Energy Star-labeled products. Applicants are also encouraged to promote energy efficiency in design and operation of the proposed project. To receive the one point, applicants must meet the following criteria:
  - *New construction or substantial rehabilitation (multifamily):* Meet ASHRAE 90.1-2007 plus 20 percent (Appendix G) and appliances must be Energy Star qualified. A heat load analysis showing compliance with this standard must be completed by the project architect or engineer during the design phase of the project.
- b) **Green Development.** Applicant can receive an additional policy priority point for green development if they fulfill the requirements for use of Energy Star appliances and projects above and meet one of the following guidelines, in addition to committing to use the HUD/PIH

Benchmark Tool:

- Energy Star Plus Indoor Air Package
- Energy Star Advanced New Home Construction
- Enterprise Green Communities Initiative
- National Association of Builders Green building Initiative
- Leadership in energy and Env. Design (LEEDS)

**The Applicant strongly supports HUD's efforts to make the buildings more energy efficient and less costly to operate. In support of this goal, the Applicant is committing to the following:**

- All appliances and equipment will have the Energy Star label.
- The design of the structure shall exceed ASHRAE 90.1-2007 by 20 percent.
- A Heat Load Analysis, in addition to a Life Cycle Cost Analysis, will be completed during the design phase.
- The project will be certified as a "Green Development" as recognized by one of the five listed green rating programs (the specific green rating program will be determined during the design phase).
- The Applicant commits to utilizing the HUD/PIH Benchmark Tool during the post-construction phase to quantify energy savings.

In anticipation of these design commitments the Applicant's design team has already commenced discussions on how to design/construct an energy efficient structure. The team had determined that durable, high quality materials shall be used throughout the project. The use of these materials will not appreciably affect the overall cost but will instead reduce long-term maintenance, repairs and replacement costs. The following represents a sampling of the energy-saving, high quality materials to be used:

- Aluminum windows with a high performance rating. (A-A2-HP)
- Elastomeric paints on exterior walls
- R-32 insulation in attics and roofs
- R-19 insulation in exterior walls
- Semi-gloss enamel paints in all public areas to reduce wear and maintenance
- High efficiency HVAC units to reduce energy consumption
- All windows will be equipped with vertical blinds for glare control and to minimize solar heat gain.
- High performance Insulated glass will be used in all openings to reduce solar gain.
- ***Use of Energy Star appliances throughout the project.***

Large roof overhangs, along with blinds and tinted glazing will reduce the heat gain at all window areas. The project will utilize the latest technology in air conditioning units with EER ratings of 12 or above will be utilized. We will also increase the R-value of insulation at the exterior walls and roofs, thus reducing the buildings heat gain. High efficiency water heaters, insulated hot water piping and energy saving light fixture and lamps will be utilized throughout.

Shade trees will be carefully placed to act as a natural sun screening elements. Exterior lighting will be placed on photoelectric cells to assure that they are operational only when necessary. When combined, the above measures will create a significant energy savings.

The proposed structural system of masonry bearing walls with pre-stressed, precast, hollow core floor

slabs is both cost-efficient and innovative. This hollow core slab system utilizes less concrete than traditional, cast in place, flat slab structural systems and provides for faster erection time. Structural integrity is not compromised. Because these slabs are only 6" thick, the height of the building can also be reduced. In addition there is no need for drywall ceiling finishes. The underside of the slab is simply sprayed with a textured coating and integral latex paint, creating a handsome textured surface ideal for bedroom and living room areas. The end result will be a project that is both energy and cost efficient and one that does not compromise on quality or maintainability.

### **Construction Efficiency**

Repetition is the key to efficient construction. All one-bedroom units (with the exception of handicapped units) are identical. This repetition extends to doors, windows, hardware, plumbing fixtures, cabinets, electrical panels, lights, air conditioning components, and lengths of floor trusses.

Common parts reduce construction time and lead to cost efficiency. Many of the components above will apply to the handicapped apartments.

Stacking units above each other contributes to further efficiency such as stacking of plumbing lines.

Component framing will be incorporated to reduce construction time and increase quality. Concrete plank floor system will speed the time of construction.

All doors, including exterior metal doors and frames, will be pre-hung to reduce labor costs.

Where code permits, multiple vents will be joined at common chases to reduce material cost and labor.

MSB type interior molding and trim will be used to reduce costs.

NEW FREESTANDING THREE STORY FACILITY :

# BLESSED POPE JOHN XXIII SENIOR HOUSING

Fort Myers, FL

HUD PROJECT NO:

## ARCHITECT

WOODROFFE CORPORATION ARCHITECTS  
5005 WEST LAUREL STREET, SUITE 215  
TAMPA, FL. 33607 813/281-0411 813/281-8921 (FAX)  
FLORIDA LICENSE NUMBER AA C001379

WOODROFFE CORPORATION ARCHITECTS		
Signature	Title	Date
Deputies or St. Petersburg		
Signature	Title	Date
Certification		
Signature	Title	Date
Other Classify		
Signature	Title	Date

## CIVIL ENGINEER

Element Engineering Group, LLC  
1814 N. 15th Street  
Tampa, Florida 33605  
813/288-2101 813/386-2106 (Fax)

## STRUCTURAL ENGINEER

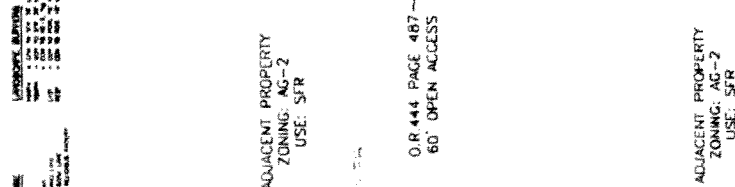
Master Consulting Engineers, Inc.  
5523 West Cypress Blvd, Suite 200  
Tampa, Florida 33607  
813/287-3600 813/287-3622 (Fax)

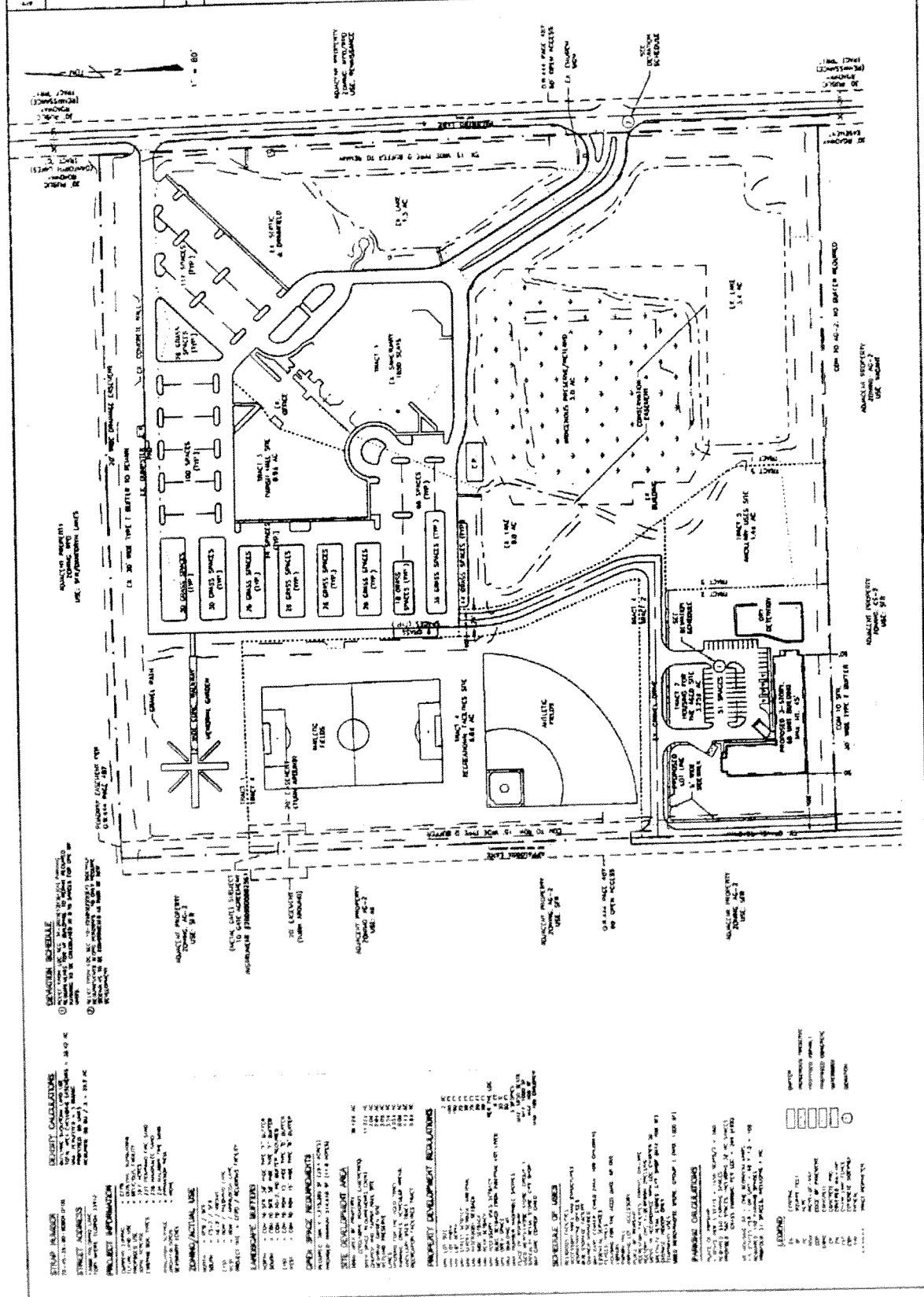
## MECHANICAL & ELECTRICAL ENGINEER

Carasio & Associates, Inc.  
2809 Dutton Street  
Tampa, Florida 33609  
813/874-9404 813/874-9794 (Fax)

DATE: MAY 4, 2009  
DESIGN DEVELOPMENT  
WCA PROJECT NO. 0904

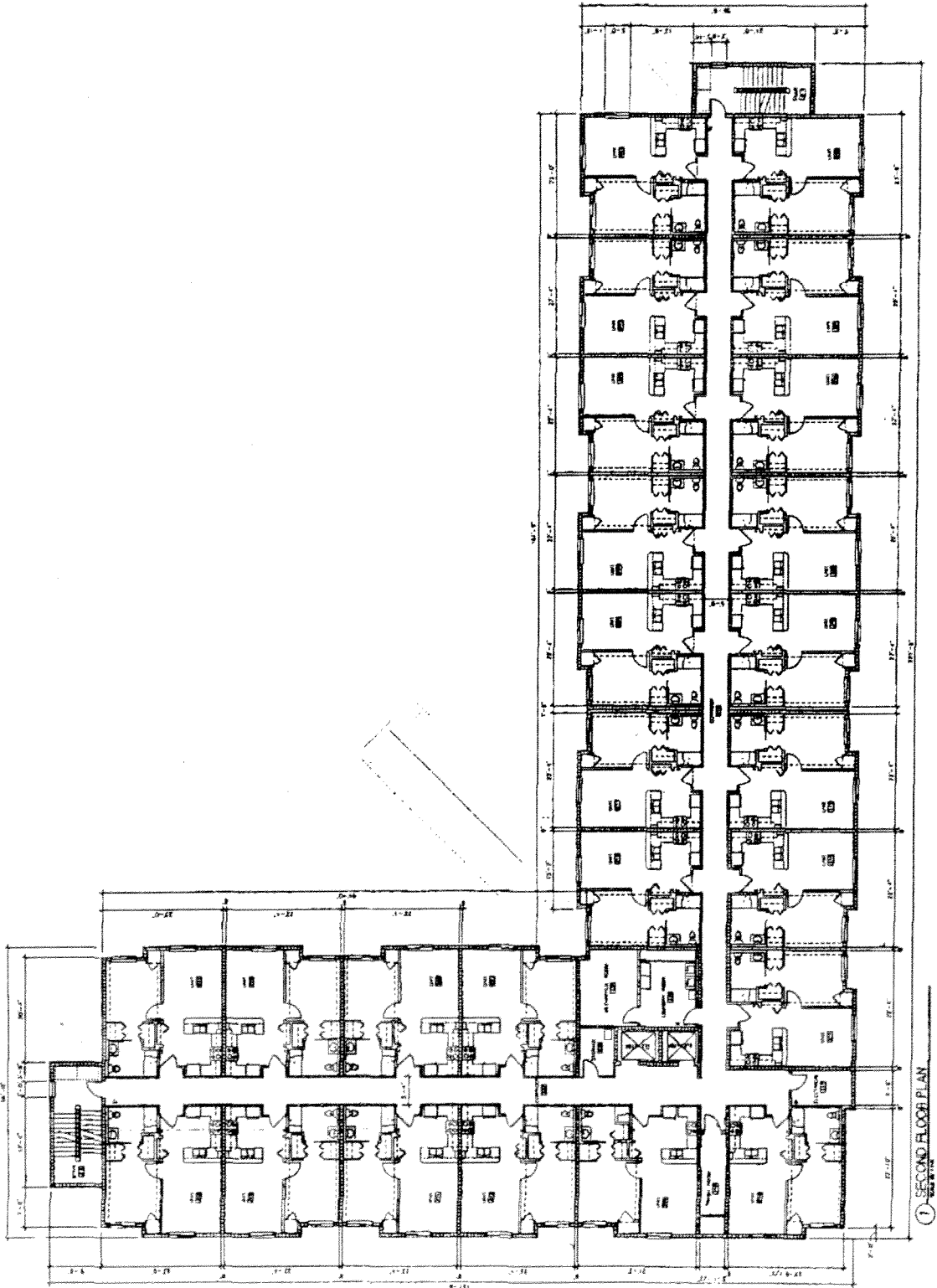
SET NO. ---







SHEET <b>A11</b>	PROJECT BLESSED POPE JOHN XXIII SENIOR HOUSING PORT MYERS, FLORIDA	ARCHITECT WOODROFFE CORPORATION 3005 WEST LAUREL STREET, SUITE 210 TAMPA, FLORIDA 33607 BID-201-0411	SCALE: 1/8" = 1'-0" DATE: 11/1/78
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**BLESSED POPE JOHN XXIII MANOR  
PRELIMINARY DEVELOPMENT BUDGET  
WITH CONTRACTOR ESTIMATE**

# Development Budget -- Pope John XXIII Manor

Updated as of: 09/21/2009

## Section G - Estimate of Replacement Costs - 92013

<b>LAND IMPROVEMENTS</b>			
1. Unusual Land Improvements			0
2. Other Land Improvements			612,400
3. Total Land Improvements			612,400
<b>STRUCTURES</b>			
4. Main Buildings (line 48 factor x factor)	73,800		5,016,200
5. Accessory Buildings			0
6. Garage			0
7. All Other Buildings			0
8. Total Structures			5,016,200
9. Subtotal (line 3 + line 8)			5,628,600
10. General Requirements (line 9 x factor)	5.5%		Incl
11. Subtotal			5,628,600
<b>FEES</b>			
12. Builder's General Overhead (line 11x factor)	2.0%		Incl
13. Builder's Profit (line 11x factor)	6.0%		Incl
14. Subtotal (sum of lines 11 thru 13)			5,628,600
15. Bond Premium (line 14 x factor)	1.5%		84,400
16. Other Fees (line 14 x factor) ****	---		547,000
17. Est. Total Cost of Construction			6,260,000
18. Architect's Fee-Design (line 14 X factor)	3.30%		185,700
19. Architect's Fee-Supervision (line 14 x factor)	1.50%		84,400
20. Total for All Improvements (sum of lines 17 thru 19)			6,530,100
21. Cost Per Gross Square Foot (line 20 divided by item 8, Section E)	164		48,500
22. Construction Time (12 + 2 months)			14
<b>CHARGES AND FINANCING DURING CONSTRUCTION</b>			
23. Interest			0
24. Taxes			0
25. Insurance			75,000
26. HUD/FHA -- MIP	0.5%		
27. HUD/FHA -- Exam Fee	0.3%		
28. HUD/FHA -- Inspection Fee	0.5%		
29. Financing Fee			
30. Permanent Placement Fee	6.9%		549,100
31. Contingency, Misc. costs	2.0%		Incl in 31
32. Additional Contingency (line 47 x factor)	0.990%		78,700
33. Title and Recording			702,800
34. Total Charges and Financing			
<b>Legal, Organization and Audit Fee</b>			
35. Legal			40,000
36. Organization			Incl in 31
37. Cost Certification Audit			8,000
38. Total Legal, Organ. and Audit Fee			48,000
39. Builder's & Sponsor's Profit & Risk			0
40. Consultant Fee (nonprofit only)			Incl in 31
41. Supplemental Management Fund			0
42. Contingency Reserve (rehab only) (line 17 x factor)	0.0%		0
43. Relocation Expenses (rehab only)	0		0
44. Other			0
45. Total Estimated Development Cost (lines 20+34+38 thru 44)			7,280,900
46. Land (estimated market price of site) (a)			680,000
46b; County Assistance			0
47. Total Est. Replacement Cost of Project (line 45 + line 46)			7,963,200
48. Average Cost per Living Unit (line 47 divided by item 7, Section C)	68		116,959
	2		
	1.25		
Original Capital Advance			9,559,800
County Funding			600,000
Total Development Budget			10,159,800
Surplus/Deficit			2,206,600

Other Fees:	GC	Owner	Total
Soil borings		7,000	7,000
Survey (topo and three updates)		12,000	12,000
County road impact fee (assumes reduction)		Incl	0
City water/sewer impact fees		408,000	408,000
City Water connection		4,000	4,000
City sewer connection		5,000	5,000
Water management fee			0
Driveway access fee			0
Land use agreement			0
Trash			0
Special Engineering		12,000	
City water meter fee (assumes one meter)		2,000	2,000
Development fee		10,000	10,000
Building permit	45,000		45,000
Final survey	4,000		4,000
Threshold inspection	0	35,000	35,000
Builders risk			0
Material testing	15,000		15,000
Total	64,000	495,000	547,000
Developer's Fees:			
Environmental			3,000
Appraisal			4,000
Cost analysis			3,000
Premarketing expenses			15,000
Capital expenditures			80,000
Organizational expenses			10,000
Fidelity bond			6,000
Project contingency			318,100
Consultant fee			110,000
Total			549,100



# ME&S

**20**  
YEARS OF  
EXCELLENCE  
1987-2007

April 24, 2008

John Hazelroth  
JPH & ASSOCIATES, INC.  
1950 Geronimo Trail  
Maitland, FL 32751  
PH: 407-645-1129

FAX: 407-645-1158

**PROJECT: HOLY CROSS MANOR II**  
Palmetto, Florida

**SUBJECT: CONCEPTUAL BUDGET ESTIMATE**

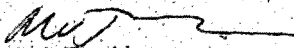
Dear John:

McIntyre Elwell & Strammer General Contractors, Inc. is pleased to present the following conceptual budget estimate for the Holy Cross Manor II, a 3-story 68-unit apartment building located in Palmetto, Florida. Our conceptual budget estimate is based on the preliminary site plan, floor plans and elevations provided by Woodroffe Corp. Architects dated 3/28/08 and the design characteristics of the existing Holy Cross Manor apartment building.

Budget for site work	\$ 612,400.00
Budget for 3-story 68 unit building	\$5,016,200.00
<b>Total</b>	<b>\$5,628,600.00</b>

Please contact our company with any questions or comments you may have.

Sincerely,

  
Bob Tomkins  
Estimator

lav

*Building Strong Relationships*

McIntyre Elwell & Strammer General Contractors, Inc.

1645 Barber Road • Sarasota, Florida 34240 • 941.377.8800 • Fax: 941.378.2296  
State License: # CGC 023903

4(d)(vi) Racial Data



## **EXHIBIT 4(d)(vi)**

### **Site and Ethnic Composition Map**

The following section includes both a site map and ethnic composition map. As indicated by the site map, the proposed site is located within close proximity to shopping, while offering residents a quiet residential setting.

#### **Ethnic Demographics At/Near Site**

Also included in this section is an ethnic composition map with corresponding data. Lee County has a population of over 440,000; of which approximately 12 percent are minority residents. The proposed project is to be located in census tract 401.06, which is a non-minority tract. The total minority population for this tract is 2.6 percent of the population.

<b>Census Tract</b>	<b>% Ethnic Residents Ethnic Concentration</b>
401.06	2% - Non-Minority
401.05	8% - Non-Minority
401.07	4% - Non-Minority
12.01	32% - Minority
12.02	6% - Non-Minority

\* Tract where project is located.

Source: Census 2000 Summary File (SF-1) (P7)

The tract in which the proposed site is located is a non-minority area, however there are nearby tracts of minority concentration, which will facilitate marketing to those least likely to apply.

#### **SERVING AND SUPPORTING THE MINORITY ELDERLY COMMUNITY**

The FHEO division of HUD looks at five factors when evaluating an applicant's outreach to the community. A total of 15 points is possible for sponsors that can demonstrate, to FHEO's satisfaction, involvement and outreach to the minority as judged by the following factors:

- 1(b)(1) — Experience in providing housing and/or support services to minorities
- 1(b)(2) — Document relationship over time with minority residents and the minority community.
- 3(c) — Suitability of the site, in that it provides opportunities to minorities

2(b) — Document that the project involves elements of such planning documents as the “Impediments to Fair Housing”.

3(e) — The inclusion of the target population in development of the application

The following paragraphs demonstrate how the Sponsor affirmatively answers each of these FHEO factors.

The Sponsor has a long history of outreach to the minority community. This outreach effort starts with the Sponsor’s efforts to hire minorities and continues with finding ways to better serve the minority community. This brief narrative addresses some of the needs within the minority community and how the Sponsors has responded or plans to respond to these needs. Evidence of the Sponsor’s ties with the minority community is demonstrated by support letters, which can be found in Exhibit 3(d).

The Sponsor is keenly aware of its responsibility to serve residents of Lee County, regardless of their income, family status, race or sex. This narrative presents why the Sponsor has and will continue to aggressively serve all residents of the County.

The Diocese of Venice has a long history of serving elderly persons, regardless of ethnic origin. A review of the Sponsor’s housing experience (at its existing Section 202 projects), shows that over 57 percent of all projects have a minority residential population which exceed that in the market area. This reveals that the Sponsor has been effective in promoting housing opportunities for minorities and encouraging minority elderly to avail themselves of such opportunity.

***Ties to the Elderly and Minority Community:*** In addition to its elderly housing, the Sponsor has addressed the needs of the elderly via establishing a Commission for Older Catholics. This Commission seeks to coordinate and facilitate an ever increasing demand for services and spiritual support to the elderly. Outreach programs for the elderly, such as “Senior’s Society” at St. Vincent de Paul Church, continue to be promoted on the parish level In an effort to meet the needs of this growing population.

On a more local level, Blessed Pope John XXIII offers senior programs in which seniors can participate in recreational, social, educational, and direct assistance services. In addition, a **Senior Elderly Advisory Committee** has been assembled to provide input into the HUD 202 application process. **This Committee is made up with both minority/non-minority elderly residents from both inside/outside of Blessed Pope John XXIII Catholic Church. The inaugural meeting was held at Blessed Pope John XXIII’s sister parish, Jesus the Worker Hispanic Mission Church in Ft. Myers. Meeting minutes and sign-in sheets are attached.**

In addition, the Sponsor has secured multiple letters from minority residents which demonstrate the Sponsor’s commitment and sensitivity to the needs of an ethnically diverse resident

population.

As mentioned earlier in this exhibit, the Diocese's commitment to the minority population is most evident in its ministry and service to the migrant farm workers (Hispanics and Haitians) with programs and outreach activities conducted throughout the ten-county regions. Social services and religious education programs as well as advocacy roles and legalization classes are but a few of the services currently provided, within the adjacent Blessed Pope John XXIII Church. **This congregation has a history of reaching out to minority residents through programs which include; (i) direct assistance to Spanish migrant farm workers; (ii) bi-lingual masses and social service programs; and (iii) partnerships with the local minority churches, which include offering programs and facilities for the use of these churches.**

***Sponsor Facilities:** The following is a list of affordable elderly projects, owned/operated by the Sponsor, and a description of the neighborhoods these facilities are located in. It should be noted that at over 70 percent of all Sponsor facilities, the minority population at the facility is equal to or greater than the minority population within the neighborhood. This is a testament of the Sponsor's ability to aggressively market units to all residents regardless of their ethnic origin.*

### Diocese of Venice – Survey of Sponsor Supported Senior Housing

<u>Project Name/Address</u>	<u>Age</u>	<u>Type</u>	<u>Total Units</u>	<u>Percentage Occupancy</u>	<u>Minority Residents</u>	<u>Wait List</u>	<u>Census Tract Neighborhood</u>	<u>% Minority within Tract</u>
Villa San Carlos 2550 Easy Street Port Charlotte, FL 33952	1986	HUD 202	49	100%	8%	6-8 mo	208 Mixed	9%
Villa San Carlos II 22250 Vick Street Port Charlotte, FL 33980	1995	HUD 202 PRAC	52	100%	37%	1-1 ½ yr	210 Non-minority	5%
Casa Santa Marta 1576 8 <sup>th</sup> Street Sarasota, FL 34236	1982	HUD 202	78	100%	13%	1 ½ yr	1.01 Mixed	13%
Casa Santa Marta II 800 N. Lemon Avenue Sarasota, FL 34236	1995	HUD 202 PRAC	54	100%	20%	2 yr	1.01 Minority	13%
Villa San Marcos 13031 Palm Beach Blvd Ft. Myers, FL 33905	2002	HUD 202 PRAC	81	100%	2%	1 yr	302 Non-minority	11%
Villa Vincente 13031 Palm Beach Blvd Ft. Myers, FL 33905	2004	HUD 202 PRAC	60	100%	11%	9 months	302 Mixed	11%
Holy Cross Manor 504 26 <sup>th</sup> Street Palmetto, FL 34221	2006	HUD 202 PRAC	68	100%	8% (a)	1 yr	14.01/2/2.52 Non-minority	0%
Holy Cross Manor II 504 26 <sup>th</sup> Street Palmetto, FL 34221	NA(b)	HUD 202 PRAC	68	NA	NA	NA	14.01/2/2.52 Non-minority	0%
<b>TOTAL/AVG</b>	—	—	<b>510</b>	—	<b>16%</b>	—	—	<b>16%</b>

(a) The City of Palmetto total minority population is 2.5 percent.

(b) Construction to start Fall 2009.

**Need For Housing Amongst Minority Residents:** The 2000 Census indicates a disproportionately greater need regarding the correction of housing problems for minority households in Lee County. However, this is due to the income disparity that is also indicated in the 2000 Census. While the County's minority households represented 12 percent, minorities represent a much greater percentage of low-income households. However, other variables such as tenure and household type and size also play a significant role in this regard, as noted below in the following chart.

**Promoting Greater Housing Opportunities for Minorities:** There are nine (9) HUD-assisted housing projects for low-income elderly in Lee County. Two of the existing projects are located in areas of minority concentrations, four are located in neighborhoods with a mixed population

and three are located in non-minority areas. The following is a summary of each of these projects.

Survey of Senior Housing in Lee County, Florida						
<u>Project Name/Address</u>	<u>Type</u>	<u>Total Units</u>	<u>Percentage Occupancy</u>	<u>Waiting List</u>	<u>Census Tract</u>	<u>% Minority</u>
Ft. Myers Presbyterian Community 1925 Virginia Ave Fort Myers, FL 33901 239-332-1050	HUD 202	180	100%	9 mo.	8	10%
Palm City Garden Apts 1625 Marsh Ave Ft. Myers, FL 33905 239-334-1303	HUD 202	100	100%	9 mo.	5.04	44%
Sandpiper Run 2075 Collier Ave Fort Myers, FL 33901 239-931-0220	HUD 202 PRAC	59	100%	1 yr.	11	50%
Villa Vincente 13071 Palm Beach Blvd Fort Myers, FL 33905 239-693-1333	HUD 202 PRAC	60	100%	6 mo.	302	13%
Sunshine Villas 1200 Broad St W Lehigh Acres, FL 33936 239-369-9161	HUD 202	216	100%	6 mo.	403.04	16%
Sunshine Villas South 1291 Broad St W Lehigh Acres, FL 33936 239-369-9161	HUD 236	80	100%	6 mo.	403.4	16%
Woodward Manor 1301 Woodward Ct Lehigh Acres, FL 33936 239-369-1414	HUD 202	102	100%	1 yr.	403.04	16%
Hatton Rogers Apts 4250 Hatton B Rogers N. Fort Myers, FL 33903 239-995-6100	HUD 202 PRAC	54	100%	1 1/2 yr.	208	2%
Palm Harbor Apts 1081 Palm Ave N. Fort Myers, FL 33903 239-995-2600	HUD 202	81	100%	1 yr.	206	6%
<b>TOTAL</b>		<b>932</b>				
Lee County's Minority Population is 12.3%						

This is a situation where there is existing HUD-assisted housing for the elderly in both minority and non-minority areas. The proposed project would be located in Census Tract 401.06, which is a non-minority census tract.

The Sponsor will continue (with the proposed site) to promote and provide housing opportunities for minority elderly residents in the following three ways. Because the project is located adjacent to census tracts of minority concentration, minority residents will have easy access to this project. The Sponsor is dedicated to both the letter and spirit of equal opportunity. Secondly, a review of the Sponsor's housing experience at other sites reveals that the Sponsor will be effective in promoting housing opportunities for minorities and encouraging minority elderly to avail themselves of such opportunity. Third, Blessed Pope John XXIII enjoys a close working relationship with the Hispanic communities via their sister parish of Jesus the Worker Hispanic Mission Church in Ft. Myers. Outreach efforts will involve partnering with this church.

***Sponsor Experience in Fair Housing:*** Individual property managers regularly attend fair housing training. Attached to this Fair Housing Narrative are details on this training.

### **Relationship with Minority Residents Organizations over Time**

Serving minority residents and working with minority organizations is not something that the Sponsor started recently. This idea is integrated to the Sponsor's mission and has been done since its inception. As previously noted, most all of the Sponsor's projects and/or programs serve minority populations at or greater than that which exists within the market place. The Sponsor has been able to achieve these results by utilizing minority-based newspapers when placing ads and by partnering with minority organizations to distribute project information and brochures.

At the end of this section are samples of Affirmative Fair Housing Marketing Plans and newspaper ads placed in minority papers. The following is a sample list of some selected organizations and papers the Sponsor utilizes when reaching out to minority residents.

- Hispanic American Alliance (Hispanic)
- Tempo Magazine (African-American)
- NAACP (African-American)
- North River News (African-American)
- Neighbors (African-American)
- Filipino American Association of SW Florida (Hispanic)

## **Fair Housing Impediments**

The purpose of designing and implementing the Analysis of Impediments to Fair Housing for Lee County (AI) was to fulfill the Certifications made by Lee County BOCC in its Consolidated Plan. The AI represents year one's accomplishment of a Five-Year Fair Housing Strategic Plan. Lee County's AI was based on a model fair housing analysis provided by HUD to county staff at a Fair Housing Workshop in early October 1995. The AI included a review of Lee County's demographics related to housing patterns by race. It also reviewed lending practices, availability of fair housing information, knowledge of fair housing practices, availability of public transportation in relation to work areas and other socio-economic factors, and reported the results two community-wide surveys regarding fair housing issues.

The AI revealed the need for an easier method for citizens to file fair housing complaints, and that the present county ordinance could be enforced more effectively. Certain historical factors attribute to this situation, viz. Lee County has not taken fair housing complaints since 1993. HUD has recently provided guidance emphasizing that fair housing ordinances be substantially equivalent to the federal Fair Housing Law, and/or that grantee jurisdictions have programs that affirmatively further fair housing. In spite of Lee County's previous approach to fair housing, which included minimal educational outreach, the focus was on taking complaints. Merely taking complaints was not pro-active enough, according to HUD, to meet the standards of affirmatively furthering fair housing for Lee County residents. As a result, Lee County is actively providing fair housing education, training, education, outreach and awareness initiatives in its attempt to address these issues.

The AI further revealed the absence of a fair housing program, which was evident from the public's survey responses -- most respondents were not aware of fair housing issues. Survey questions focused on the public's perception of property appraisers, bankers, real estate professionals, and others in the housing business. Respondents generally favored county government becoming more pro-actively involved in the development of a fair housing program. Two other factors impacting fair housing in Lee County were decent, affordable, rental housing opportunities for migrants and/or farm workers, and substandard housing conditions in existing communities. These issues require pro-active measures in order to respond to critical areas of unmet need, as identified by the public. The AI concluded that county staff will develop program options for a core-service fair housing program. Currently, 80 grantee jurisdictions in the United States have a substantially equivalent fair housing ordinance. The AI suggests doing a program review of these jurisdictions in order to develop and implement a well-rounded Lee County program.

Within this report, Lee County identified several impediments to fair housing and these include:

1. Lee County has done little to affirmatively further fair housing.
2. Lee County has not defined what "affirmatively furthering fair housing" means for its citizens.
3. Lee County has no organizations dedicated to fair housing.
4. Survey results show that most residents are not familiar with "fair housing" issues.
5. Lee County has assigned almost no CDBG funds to affirmatively further fair housing.
6. There are several examples of the "not in my backyard (NIMBY) attitude in Lee County.

Of these six impediments, the following is how the Sponsor's involvement in the Section 202 program has actively reduced identified impediments.

- Response to Impediments 1, 2, 3, & 4 — The Diocese of Venice has actively marketed rental units to residents regardless of their ethnic origin. The Diocese success of 20 percent of its residents being minorities is attributed to: i) The Diocese extensive outreach and networking with minority community-based organization; ii) The Diocese aggressive affirmative marketing program; iii) The Diocese willingness to sensitize staff on fair housing issues by sponsoring and paying for a fair housing workshop; and iv) by The Diocese placing projects in both mixed race and non-mixed race areas.
- Response to Impediments 1, 2, 3, & 4 — The Diocese of Venice success has resulted in a definition of fair housing. In the Diocese terms, this is when minorities are represented in terms of those receiving services or apartments in numbers at or above the portion of the minority population to the total population.
- Response to Impediments 6 — The Diocese of Venice has not backed down from challenges to neighbors, and has actively pursued the rights of residents. For example, the Diocese progressed through public hearings and received some opposition. The Diocese met with this opposition to articulate the projects and its impact upon neighboring land owners. As a result of this education and outreach process, the opposition was reversed to support for the project.

It is clear from these examples that the Diocese of Venice has been at the forefront of promoting fair housing to residents regardless of their ethnic origin.

## **Conclusion**

HUD has indicated the methodology in which projects will be rated is as follows.



The suitability of the site from the standpoints of promoting a greater choice of housing opportunities for minorities and persons with disabilities and affirmatively furthering fair housing. In reviewing this criterion, HUD will assess whether the site meets the site and neighborhood standards at 24 CFR 891.125(b) and (c) by examining relevant data in your application or in the HUD Office. If appropriate, HUD may visit the site.

The site will be deemed acceptable if it increases housing choice and opportunity by:















Expanding housing opportunities in non-minority neighborhoods if located in such a neighborhood. ("Non-minority area" is defined as one in which the minority population is lower than 10 percent.)

Within the market area, projects are located both inside and outside of areas of minority concentration. **The proposed project is located in a non-minority area and should be awarded the full points.**

## **SITE LOCATION MAP**

[illegible]

### 500 Meters

- |   |                   |   |                    |
|---|-------------------|---|--------------------|
|  | Local Road        |  | Geographic Feature |
|  | Major Connector   |  | Locale             |
|  | State Route       |  | Cemetery           |
|  | Trail             |  | Population Center  |
|  | US Highway        |  | Water              |
|  | Railroad          |  | River/Canal        |
|  | Point of Interest |   |                    |
|  | Small Town        |   |                    |

**CENSUS TRACT MAP  
DIOCESE OF VENICE  
BLESSED POPE JOHN XXIII SITE**

Diocese of Venice  
Blessed Pope John XXIII Manor  
Ft. Myers, FL  
Census Tract Map

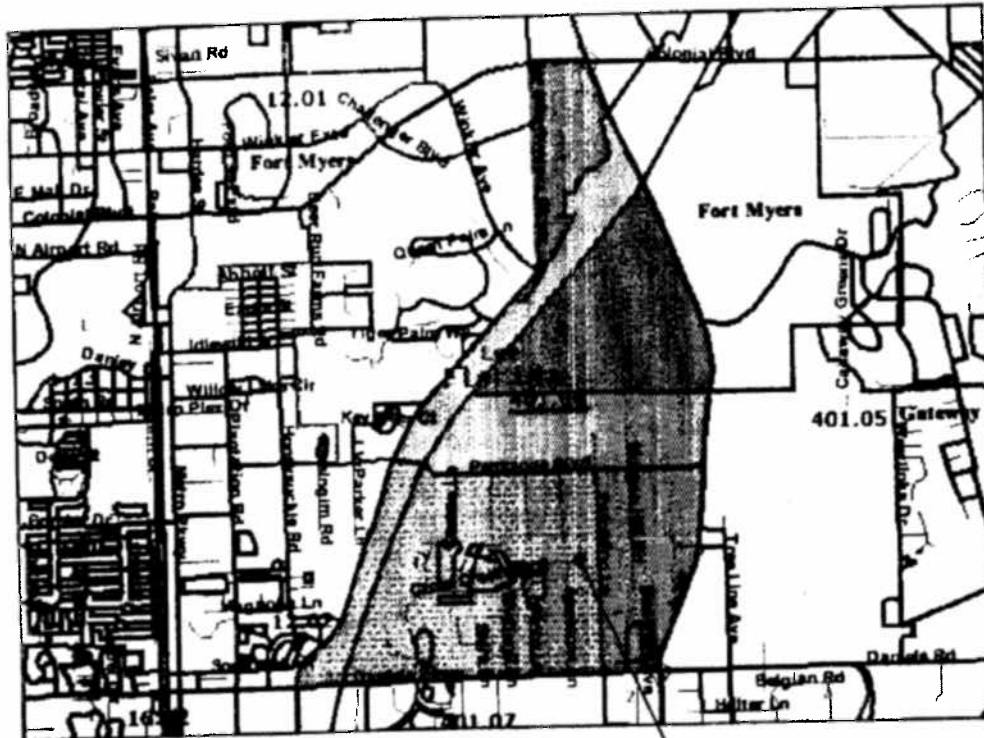
Census Tract 401.06, Lee County, Florida

**Boundaries**

- State
- County
- Census Tract
- Block Group
- Block
- Place
- Place
- Urban Area
- Urban Area

**Features**

- Major Road
- Street
- Stream/Waterbody
- Stream/Waterbody



7 miles across

Close

Ethnic Population  
By Census Tract  
Diocese of Venice  
Ft. Myers, Lee County, FL

**DIOCESE OF VENICE**  
**Selected Affirmative Fair Housing Marketing Plans**

# Affirmative Fair Housing Marketing Plan

U.S. Department of Housing and Urban Development  
Office of Fair Housing and Equal Opportunity

OMB Approval No. 2529-0013  
(exp. 09/30/2003)

1a. Applicant's Name, Address (including city, state & zip code) & Phone Number  Holy Cross Manor, Inc. 504 26th Street West Palmetto, FL 34221		1c. Project/Application Number  067-EE126	1d. Number of Units  68	1e. Price or Rental Range From \$ To \$ 271.00
1b. Project's Name, Location (including city, State and zip code)  Holy Cross Manor, Inc. 504 26th Street West Palmetto, FL 34221		1f. For Multifamily Housing Only <input checked="" type="checkbox"/> Elderly <input type="checkbox"/> Non-Elderly	1g. Approximate Starting Dates (mm/dd/yyyy) Advertising 05/2006 Occupancy 08/2006	
		1h. Housing Market Area Manatee	1i. Census Tract 14.01	
		1j. Managing/Sales Agent's Name & Address (including city, State and zip code) SPM, Inc. 6220 Manatee Ave. W. Suite 204 Bradenton, FL 34209		

2. Type of Affirmative Marketing Plan (mark only one) <input checked="" type="checkbox"/> Project Plan <input type="checkbox"/> Minority Area <input type="checkbox"/> White (non-minority) Area <input type="checkbox"/> Mixed Area (with _____ % minority residents)	3. Direction of Marketing Activity (Indicate which group(s) in the housing market area are least likely to apply for the housing because of its location and other factors without special outreach efforts) <input type="checkbox"/> White (non-Hispanic) <input checked="" type="checkbox"/> Hispanic <input type="checkbox"/> American Indian or Alaskan Native <input checked="" type="checkbox"/> Black (non-Hispanic) <input type="checkbox"/> Asian or Pacific Islander <input type="checkbox"/> Persons with Disabilities
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4a. Marketing Program: Commercial Media (Check the type of media to be used to advertise the availability of this housing) <input checked="" type="checkbox"/> Newspapers/Publications <input checked="" type="checkbox"/> Radio <input type="checkbox"/> TV <input type="checkbox"/> Billboards <input type="checkbox"/> Other (specify)		
Name of Newspaper, Radio or TV Station	Race/Ethnic Identification of Readers/Audience	Size/Duration of Advertising
North River News	Mixed	3"x5" display - 3 months
Woodwind Senior Center	Mixed	3"x5" display - 3 months
Senior Friends	Mixed	3"x5" display - 3 months

4b. Marketing Program: Brochures, Signs, and HUD's Fair Housing Poster

(1) Will brochures, letters, or handouts be used to advertise? ☒ Yes ☐ No If "Yes", attach a copy or submit when available.

(2) For project site sign, indicate sign size \_\_\_\_\_ x \_\_\_\_\_; Logotype size \_\_\_\_\_ x \_\_\_\_\_. Attach a photograph of project sign or submit when available.

(3) HUD's Fair Housing Poster must be conspicuously displayed wherever sales/rentals and showings take place. Fair Housing Posters will be displayed in the ☐ Sales/Rental Office ☐ Real Estate Office ☐ Model Unit ☐ Other (specify)

4c. Community Contacts. To further inform the group(s) least likely to apply about the availability of the housing, the applicant agrees to establish and maintain contact with the groups/organizations listed below that are located in the housing market area or SMSA. If more space is needed, attach an additional sheet. Notify HUD-FHEO of any changes in this list. Attach a copy of correspondence to be mailed to these groups/organizations. (Provide all requested information.)

Name of Group/Organization	Race/Ethnic Identification	Approximate Date (mm/dd/yyyy)	Person Contacted or to be Contacted
Neighborhood Senior Services	mixed	120 days	John Swartz
Woodwind Senior center	mixed	120 days	Leslie Chapman
Senior Friends	mixed	120 days	Wendy Rogers
Chamber of Commerce of Manatee	mixed	120 days	Bob Bartz
Address & Phone Number	Method of Contact	Indicate the specific function the Group/Organization will undertake in implementing the marketing program	
4140 20th Street W. Bradenton 941 758-9969	personal visit, brochures	referrals & outreach	
1800 Woodwinds Dr Bradenton 941 748-2641	personal visit, brochures	referrals & outreach	
6870 59th St W Bradenton 941 792-0211	personal visit, brochures	referrals & outreach	
222 10th Street W. Bradenton 748-3411	personal visit, brochures	referrals & outreach	

5. Future Marketing Activities (Rental Units Only) Mark the box(s) that best describe marketing activities to fill vacancies as they occur after the project has been initially occupied. <input checked="" type="checkbox"/> Newspapers/Publications <input type="checkbox"/> Radio <input type="checkbox"/> TV <input checked="" type="checkbox"/> Brochures/Leaflets/Handouts <input checked="" type="checkbox"/> Site Signs <input checked="" type="checkbox"/> Community Contacts <input type="checkbox"/> Other(specify)	6. Experience and Staff Instructions (See instructions) 6a. Staff has experience. <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No 6b. On separate sheets, indicate training to be provided to staff on Federal, State and local fair housing laws and regulations, as well as this AFHM Plan. Attach a copy of the instructions to staff regarding fair housing.
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7. Additional Considerations Attach additional sheets as needed.

Staff has training in 504, Fair Housing, and ADA laws. A Fair Housing notebook and instructions manual will be issued. Fair Housing and 504 training will be provided.

8. Changes and Revisions By signing this form, the applicant agrees, after appropriate consultation with HUD, to change any part of the plan covering a multifamily project to ensure continued compliance with Section 200.620 of HUD's Affirmative Fair Housing Marketing Regulations. Signature of person submitting this Plan & Date of Submission (mm/dd/yyyy) <i>Robert Harlow 2/24/2004</i>		For HUD-Office of Housing Use Only Approval By Signature & Date (mm/dd/yyyy) <i>Debra Thompson 9/1/2004</i>		Disapproval By Signature & Date (mm/dd/yyyy)	
Name (type or print) Robert Harlow		Name (type or print) Debra Thompson		Name (type or print)	
Title & Name of Company Property Manager, SPM, Inc.		Title Supervisory Project Manager		Title	

Previous editions are obsolete

# Affirmative Fair Housing Marketing Plan

U.S. Department of Housing  
and Urban Development  
Office of Fair Housing and Equal Opportunity

OMB Approval No. 2529-0013  
(exp. 08/30/2003)

1a. Applicant's Name, Address (including city, state & zip code) & Phone Number <b>ST. MARTHA'S HOUSING, INC. 1578 8TH STREET SARASOTA, FL 34236  813 366-4446</b>		1c. Project/Applicant Number <b>067-EH113</b>	1d. Number of Units <b>78</b>	1e. Price or Rental Range From \$ <b>30% OF</b> To \$ <b>INCOME</b>
1b. Project's Name, Location (including city, state and zip code) <b>CASA SANTA MARTA 1578 8TH STREET SARASOTA, FL 34236</b>		1f. For Multifamily Housing Only <input checked="" type="checkbox"/> Elderly <input type="checkbox"/> Non-Elderly	1g. Approximate Starting Dates (mm/dd/yyyy) Advertising <b>AS NEEDED</b> Occupancy <b>100%</b>	
		1h. Housing Market Area <b>SARASOTA</b>	1i. Census Tract <b>1.01</b>	
		1j. Managing/Sales Agent's Name & Address (including city, state and zip code) <b>SPM, INC. 6220 MANATEE AVE. W. SUITE 204 BRADENTON, FL 34209</b>		

2. Type of Affirmative Marketing Plan (mark only one)

☐ Project Plan  
☐ Minority Area  
☐ White (non-minority) Area  
☒ Mixed Area (with 18 % minority residents)

3. Direction of Marketing Activity (Indicate which group(s) in the housing market area are least likely to apply for the housing because of its location and other factors without special outreach efforts)

☐ White (non-Hispanic) ☐ Hispanic ☒ American Indian or Alaskan Native  
☒ Black (non-Hispanic) ☒ Asian or Pacific Islander ☐ Persons with Disabilities

4a. Marketing Programs: Commercial Media (Check the type of media to be used to advertise the availability of this housing)

☒ Newspapers/Publications ☒ Radio ☐ TV ☐ Billboards ☐ Other (specify)

Name of Newspaper, Radio or TV Station	Racial/Ethnic Identification of Readers/Audience	Start/Duration of Advertising
THE BULLETIN	BLACK 100%	AS NEEDED
SARASOTA HEARLD	ALL	AS NEEDED
THE WEEKLY	ALL	AS NEEDED
THE TEMPO	BLACK 100%	AS NEEDED

4b. Marketing Programs: Brochures, Signs, and HUD's Fair Housing Poster

(1) Will brochures, letters, or handouts be used to advertise? ☒ Yes ☐ No If "Yes", attach a copy or submit when available.  
(2) For project site sign, indicate sign size        x       ; Logotype size        x       . Attach a photograph of project sign or submit when available.  
(3) HUD's Fair Housing Poster must be conspicuously displayed wherever sales/rentals and showings take place. Fair Housing Posters will be displayed in the ☒ Sales/Rental Office ☐ Real Estate Office ☐ Model Unit ☐ Other (specify)

4c. Community Contacts: To further inform the group(s) least likely to apply about the availability of the housing, the applicant agrees to establish and maintain contact with the groups/organizations listed below that are located in the housing market area or SAMA. If more space is needed, attach an additional sheet. Notify HUD-FHEO of any changes in this list. Attach a copy of correspondence to be mailed to these groups/organizations. (Provide all requested information.)

Name of Group/Organization	Racial/Ethnic Identification	Approximate Date (mm/dd/yyyy)	Person Contacted or to be Contacted
SENIOR FRIENDSHIP CENTER	ALL	ONGOING	PAULA CILLA
Elder Helpline	ALL	12/03	ELIZABETH BECKWORTH
ST. MARTHA'S CHURCH	HISPANIC/ALL	ONGOING	SERE BRINN
SALVATION ARMY SARASOTA CORP	ALL	ONGOING	MAJOR BERT TANNER, ATTN: BRYAN POPE
Address & Phone Number	Method of Contact	Indicate the specific function the Group/Organization will undertake in implementing the marketing program.	
1686 ALDERMAN ST., SARASOTA	PERSONAL	REFERRALS FROM CALLS & LETTERS	
512 E. GRACE ST. PUNTA GORDA	LETTER	REFERRALS FROM CALLS & LETTERS	
200 N. ORANGE AVE. SARASOTA	PERSONAL	CHURCH BULLETIN	
1701 S TUTTLE AVE. SARASOTA	PHONE	REFERRALS FROM CALLS & LETTERS	

5. Future Marketing Activities (Rental Units Only) Mark the box(es) that best describe marketing activities to fill vacancies as they occur after the project has been largely completed.

☒ Newspapers/Publications ☐ Radio ☐ TV ☒ Brochures/Letters/Handouts  
☐ Site Signs ☒ Community Contacts ☐ Other (specify)

6. Experience and Staff Instructions (See instructions)  
6a. Staff has experience. ☒ Yes ☐ No  
6b. On separate sheets, indicate training to be provided to staff on Federal, State and local fair housing laws and regulations, as well as this AFHM Plan. Attach a copy of the instructions to staff regarding fair housing.

7. Additional Considerations: Attach additional sheets as needed.

ANNUAL TRAINING BY: FAHA (STATE ORGANIZATION) AND SPM INC. (PROPERTY MGMT COMPANY IN 504/ADA & FAIR HOUSING, ETC.)

8. Changes and Revisions: By signing this form, the applicant agrees, after appropriate consultation with HUD, to change any part of the plan covering a multifamily project to ensure continued compliance with Section 200.620 of HUD's Affirmative Fair Housing Marketing Regulations.		For HUD-Office of Housing Use Only	
Signature of Person Submitting this Plan & Date of Submission (mm/dd/yyyy) <i>Bob Harlow</i> 07/24/2004		Approval By Signature & Date (mm/dd/yyyy) <i>Ferdinand R. Sulu</i>	Disapproval By Signature & Date (mm/dd/yyyy)
Name (type or print) BOB HARLOW		Name (type or print) Ferdinand R. Sulu	Name (type or print)
Title & Name of Company PROPERTY MANAGER		Title HUD Director	Title



# Affirmative Fair Housing Marketing Plan

U.S. Department of Housing  
and Urban Development  
Office of Fair Housing and Equal Opportunity

OMB Approval No. 2529-0013  
(exp. 09/30/2003)

1a. Applicant's Name, Address (including city, state & zip code) & Phone Number  ST. MARTHA'S HOUSING II, INC. 800 N. LEMON STREET SARASOTA, FL 34238  813 365-7913		1c. Project/Application Number  067-EE003	1d. Number of Units  52	1e. Price or Rental Range From \$ 30% OF To \$ INCOME
1b. Project's Name, Location (including city, State and zip code)  CASA SANTA MARTA II 800 N. LEMON AVENUE SARASOTA, FL 34236		1f. For Multifamily Housing Only <input checked="" type="checkbox"/> Elderly <input type="checkbox"/> Non-Elderly	1g. Approximate Starting Dates (mm/dd/yyyy) Advertising AS NEEDED Occupancy 100%	
		1h. Housing Market Area SARASOT	1i. Census Tract 1.01	
		1j. Managing/Sales Agent's Name & Address (including city, State and zip code) SPM, INC. 6220 MANATEE AVE. W. SUITE 204 BRADENTON, FL 34209		

2. Type of Affirmative Marketing Plan (mark only one)

☐ Project Plan  
☐ Minority Area  
☐ White (non-minority) Area  
☒ Mixed Area (with 18 % minority residents)

3. Direction of Marketing Activity (Indicate which group(s) in the housing market area are least likely to apply for the housing because of its location and other factors without special outreach efforts)

☐ White (non-Hispanic) ☐ Hispanic ☒ American Indian or Alaskan Native  
☒ Black (non-Hispanic) ☒ Asian or Pacific Islander ☐ Persons with Disabilities

4a. Marketing Program: Commercial Media (Check the type of media to be used to advertise the availability of this housing)

☒ Newspapers/Publications ☒ Radio ☐ TV ☐ Billboards ☐ Other (specify)

Name of Newspaper, Radio or TV Station	Racial/Ethnic Identification of Readers/Audience	Size/Duration of Advertising
THE BULLETIN	BLACK 100%	AS NEEDED
SARASOTA HEARLD	ALL	AS NEEDED
THE WEEKLY	ALL	AS NEEDED
THE TEMPO	BLACK 100%	AS NEEDED

4b. Marketing Program: Brochures, Signs, and HUD's Fair Housing Poster

(1) Will brochures, letters, or handouts be used to advertise? ☒ Yes ☐ No If "Yes", attach a copy or submit when available.  
(2) For project site sign, indicate sign size x ; Logotype size x . Attach a photograph of project sign or submit when available.  
(3) HUD's Fair Housing Poster must be conspicuously displayed wherever sales/rentals and showings take place. Fair Housing Posters will be displayed in the ☒ Sales/Rental Office ☐ Real Estate Office ☐ Model Unit ☐ Other (specify)

4c. Community Contacts. To further inform the group(s) least likely to apply about the availability of the housing, the applicant agrees to establish and maintain contact with the groups/organizations listed below that are located in the housing market area or SMSA. If more space is needed, attach an additional sheet. Notify HUD-FHEO of any changes in this list. Attach a copy of correspondence to be mailed to these groups/organizations. (Provide all requested information.)

Name of Group/Organization	Racial/Ethnic Identification	Approximate Date (mm/dd/yyyy)	Person Contacted or to be Contacted
SENIOR FRIENDSHIP CENTER	ALL	ONGOING	PAULA CILLA
ELDER HELPLINE	ALL	12/03	ELIZABETH BECKWORTH
ST. MARTHA'S CHURCH	HISPANIC/ALL	ONGOING	SERE BRINN
SALVATION ARMY SARASOTA CORP	ALL	ONGOING	MAJOR BERT TANNER, ATTENT. BRYAN POPE
Address & Phone Number	Method of Contact	Indicate the specific function the Group/Organization will undertake in implementing the marketing program	
1888 ALDERMAN ST., SARASOTA	PERSONAL	REFERRALS FROM CALLS & LETTERS	
512 E. GRACE ST. PUNTA GORDA	LETTER	REFERRALS FROM CALLS & LETTERS	
200 N. ORANGE AVE. SARASOTA	PERSONAL	CHURCH BULLETIN	
1701 S TUTTLE AVE. SARASOTA	PHONE	REFERRALS FROM CALLS & LETTERS	

5. Future Marketing Activities (Rental Units Only) Mark the box(s) that best describe marketing activities to fill vacancies as they occur after the project has been initially occupied.

☒ Newspapers/Publications ☐ Radio ☐ TV ☒ Brochures/Leaflets/Handouts  
☐ Site Signs ☒ Community Contacts ☐ Other (specify)

6. Experience and Staff Instructions (See instructions)

6a. Staff has experience. ☒ Yes ☐ No  
6b. On separate sheets, indicate training to be provided to staff on Federal, State and local fair housing laws and regulations, as well as this AFHM Plan. Attach a copy of the instructions to staff regarding fair housing.

7. Additional Considerations. Attach additional sheets as needed.

ANNUAL TRAINING BY: FAHA (STATE ORGANIZATION) AND SPM INC. (PROPERTY MGMT COMPANY IN 504/ADA & FAIR HOUSING, ETC.)

3. Changes and Revisions. By signing this form, the applicant agrees, after appropriate consultation with HUD, to change any part of the plan covering a multifamily project to ensure continued compliance with Section 200.620 of HUD's Affirmative Fair Housing Marketing Regulations.

Signature of person submitting this Plan & Date of Submission (mm/dd/yyyy)  
*Bob Harlow* 07/24/2004

Name (type or print) BOB HARLOW

Title & Name of Company PROPERTY MANAGER

For HUD-Office of Housing Use Only	
Approval By	Disapproval By
Signature & Date (mm/dd/yyyy) <i>Ferdinand R. Jukile Jr</i> 8/11/04	Signature & Date (mm/dd/yyyy)
Name (type or print) Ferdinand R. Jukile Jr	Name (type or print)
Title Multifamily AUB Director	Title